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Jewish Community Federation Leadership Oral History Project

Douglas M. Heller

PRESIDENT, JEWISH COMMUNITY FEDERATION OF SAN FRANCISCO, THE PENINSULA,
MARIN AND SONOMA COUNTIES, 1994-1996

With Introductions by
Wayne Feinstein
and
Robert Levison, Jr.

Interviews Conducted by
Eleanor Glaser
in 1996

Since 1954 the Regional Oral History Office has been interviewing leading participants in or well-placed witnesses to major events in the development of Northern California, the West, and the Nation. Oral history is a method of collecting historical information through tape-recorded interviews between a narrator with firsthand knowledge of historically significant events and a well-informed interviewer, with the goal of preserving substantive additions to the historical record. The tape recording is transcribed, lightly edited for continuity and clarity, and reviewed by the interviewee. The corrected manuscript is indexed, bound with photographs and illustrative materials, and placed in The Bancroft Library at the University of California, Berkeley, and in other research collections for scholarly use. Because it is primary material, oral history is not intended to present the final, verified, or complete narrative of events. It is a spoken account, offered by the interviewee in response to questioning, and as such it is reflective, partisan, deeply involved, and irreplaceable.

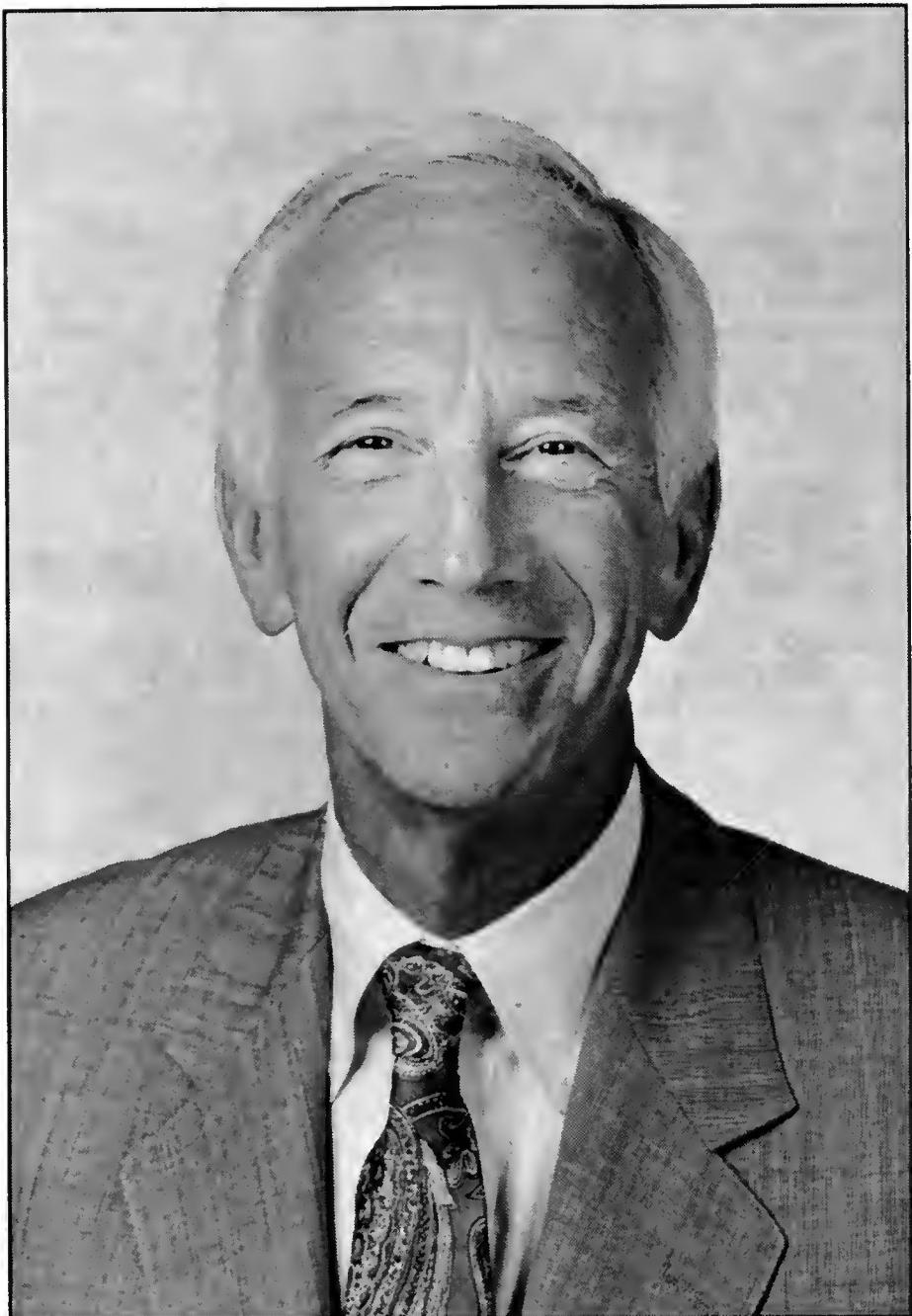
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Jewish Community Leader

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Family background, and business career with Levison Brothers Insurance Brokerage; president, Jewish Home for the Aged, 1991-1993; San Francisco-based Jewish Community Federation: committee assignments, 1971 Lloyd W. Dinkelspiel Memorial Award, 1975 campaign chairman; federation president: changes implemented, reflections on presidency, federation's role in community; affiliations with Concordia Club, temples Emanu-El and Beth Am, Menlo Circus Club.

Introductions by Wayne Feinstein, Executive Vice President, Jewish Community Federation of San Francisco, the Peninsula, Marin and Sonoma Counties; and Robert Levison, Jr., Senior Vice President (retired), Sedgwick of California.

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PREFACE

The Jewish Community Federation Leadership Oral History Project was initiated in 1990, under the sponsorship of the Jewish Community Endowment Fund, to record the recent history of the Jewish Welfare Federation. Through oral histories with the sixteen living past presidents and two past executives of the Federation, the project seeks to document Jewish philanthropy in the West Bay as spearheaded by the Federation during the past half-century.

The Jewish community can take pride in the manner in which it has, through the years, assumed the traditional Jewish role of providing for the less fortunate. Organized Jewish philanthropy in San Francisco began in 1850 with the Eureka Benevolent Association, today's Jewish Family and Children's Service Agency. With the organization in 1910 of the Federation of Jewish Charities, the community took the major step of coordinating thirteen separate social service agencies. The funding of local services was absorbed by the Community Chest when the Federation affiliated with it in 1922. Soon thereafter, the need was seen for an organization to support the financial needs of national and overseas agencies. This led to the formation of the Jewish National Welfare Fund in 1925, which pioneered in conducting a single annual campaign for Jewish needs outside of San Francisco. The Federation of Jewish Charities and the Jewish National Welfare Fund merged in 1955, becoming the Jewish Welfare Federation, the forerunner of the present Jewish Community Federation of San Francisco, the Peninsula, Marin and Sonoma Counties.

This oral history project was conceived by Phyllis Cook, executive director of the Jewish Community Endowment Fund, and Eleanor Glaser, the oral historian who had just completed the oral history of Sanford M. Treguboff, the late executive director of the Federation. They realized that 1990 would be the thirty-fifth year of the Jewish Welfare Federation and that it was none too soon to try to capture the insights and experiences of the Federation's first presidents. Not only would these leaders be able to document the dynamic history of the Federation, but they could link that to the activities of several other agencies since all had prepared themselves for their services as Federation president by working in one or another capacity in the earlier Jewish charitable institutions.

Thus, it was anticipated that through the recollections of these Federation presidents it might be also possible to understand the driving motivations and principles of those pioneer leaders and the forces they dealt with during the building of the Bay Area Jewish community.

Phyllis Cook, in consultation with the board of directors of the Jewish Community Endowment Fund, worked with the Regional Oral History Office of The Bancroft Library, University of California, Berkeley, to carry out the project. Direction of the project was assumed by Eleanor Glaser, the office research editor for Jewish history subjects.

In the oral history process the interviewer works closely with the memoirist in the preliminary research and in setting up topics for discussion. For the Federation project, Eleanor Glaser conducted extensive research in the Federation Board minutes in order to determine critical events, committee assignments, and the pressing needs during each president's term of office. The interviews are informal conversations that are tape recorded, transcribed, edited by the interviewer for continuity and clarity, checked and approved by the interviewee, and then final typed. The oral history manuscripts are open to research in libraries nationwide. Copies of the Federation project oral histories will be available in the Federation Library; The Bancroft Library; the Department of Special Collections, Library, UCLA; and in other libraries interested in collecting source material on this subject.

Sam Ladar, president of the Jewish Welfare Federation in 1965 and 1966, was the first interviewee. As the initial oral history for the project, general Federation information such as early board minutes, lists of officers, etc., have been included in the Ladar volume. Researchers are advised to start there.

The Regional Oral History Office was established in 1954 to record the lives of persons who have contributed significantly to the history of California and the West. The Office is administered by The Bancroft Library. Over the years the Office has documented a number of leaders in the California Jewish community. The Office is honored to have this opportunity to document Jewish philanthropy in the San Francisco Bay Area.

Eleanor Glaser, Project Director
Jewish Community Federation Leadership
Oral History Project

Willa Baum, Division Head
Regional Oral History Office

December 1996
Regional Oral History Office
The Bancroft Library
University of California, Berkeley

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Roselyne C. Swig, President, Jewish Community Federation of San Francisco, the Peninsula, Marin and Sonoma Counties, 1992-1994

INTRODUCTION by Wayne Feinstein

October 1993, late on a "jet-lagged" night, I sat alone with Doug Heller in the "VIP lounge" of the International Airport in Tashkent, Uzbekistan, waiting for our flight to Tel Aviv. We were completing a whirlwind four-day visit of a few American Jewish community leaders with the Jewish community of Central Asia. Surrounded by Muslim clerics who came from throughout Central Asia and Iran, we had experienced days of eye-opening encounters with a Jewish community that time had forgotten and who are now feverishly engaged in leaving for Israel. The food was inedible, the water undrinkable, and we had nursed ourselves on canned tuna, Coca-cola, and vodka.

In those few private hours, Doug and I talked openly and frankly about the legacy of leadership in his own family, his hopes and aspirations for his forthcoming term as president of the Jewish Community Federation, and how he would want to be remembered in the long and dynamic history of Jewish community leadership.

Doug Heller is a thoughtful, dedicated, committed, and effective Jewish community leader. A keen part of his effectiveness is his quiet insistence on understanding an issue: its background, causation, and alternative solutions, before allowing it to come forward through the decision-making process. In my nearly twenty-five years as a professional in Jewish community service, I found that few volunteer leaders apply themselves as thoroughly as Doug does to understanding issues fully and completely before recommending solutions.

Doug's personal style is self-effacing. He has a wonderful, constructive sarcasm, and the beautiful use of just the right quip to lighten the mood and diffuse otherwise tense situations. He is a wonderful traveling companion, and one who put aside all of the distractions to undertake those trips, meetings, and obligations particular to his role as the leader of the Jewish community.

Doug came to his service as president of the Federation after a long interregnum. His campaign chairmanship was in the early 1970s, when I first came to San Francisco as a young professional. In the intervening years, rather than pursue the straightforward path to his presidency, Doug served well on the boards of Federation agencies, other nonprofit organizations, and of his beloved synagogue, Congregation Emanu-El in San Francisco. The term immediately preceding his Federation presidency, Doug proved one of the most effective of presidents for the Jewish Home for the Aged in San Francisco, and successfully completed a \$22 million capital drive to build a hospital wing, known as the Friedman Pavilion, on the grounds.

When Doug ascended to the Federation presidency, the community was at the beginning of an important transitional period. As with all transitions, not all of the leadership were completely aware of why matters had become so difficult or why we were in the middle of turbulent waters. Consider the issues before him: the election of the U.S. Congress in 1994 and the resultant legislative changes in public funding for health and human services, the recognition that Federation's health and welfare agencies were highly dependent on public dollars, and the need therefore to create awareness in our agency system and to prepare for a wrenching period of change, the tailing down of the massive migration of Jews from the former Soviet Union; the completion of a five-year process of downsizing and retrenchment at the Federation which resulted in inadvertently goring a few "sacred cows;" and the recognition, by the end of his term, that Federation would need to concentrate deeply on the underlying question of what its role should be, if any, in the coming twenty years, if we were to be of service to the well-being of Jewish life in our community.

Doug Heller's term as president went forward smoothly and effectively guided by his deep roots in the San Francisco Bay Area and the Jewish community, his distinct and selfless personal engagement in issues, and his warm and wonderful sense of humor and camaraderie. Doug has become a good and true friend and one whose insight, support, and commitment I shall always treasure.

Wayne Feinstein, Executive Vice President
Jewish Community Federation of San
Francisco, the Peninsula, Marin and
Sonoma Counties

March 1997
San Francisco

INTRODUCTION by Robert Levison

Doug Heller has been a business partner for over forty years and a personal friend for many years before that.

My parents and Doug's parents were close friends and I grew up knowing Harold, Doug's oldest brother, Robs, the middle brother, and Doug, the youngest. I never expected at that time that our lives would merge, and we would spend almost our entire working career together. After Doug graduated from Stanford Business School in 1957, he decided that he wanted to work in the insurance business. He arrived at Levison Insurance knowing as little about insurance as I did when I started.

At that time, there were sixteen people in the office, and the world was different. We remember it now as being a lot better then, and I truly think it was, principally because we got to know each other in a way that is much more difficult today because of the larger size of organizations and their pace.

We became partners in the firm at approximately the same time, and since then have been associated on a daily basis in a strong business friendship. There has never been a time when Doug and I have ever had a serious disagreement; and because of that, the two of us have a mutual respect for each other that is hard to duplicate. The only time we ever disagreed was once a year when it was time to decide on the bonuses for the partners. For about one week, Doug was upset, not because of what we got, but because of what others got. That quickly passed, and the other fifty-one weeks of the year were perfect.

Doug's relationship with his clients is unique. Besides being respected and sought out, he has become close personal friends with many of the clients. They enjoy both his business advice and his friendship. Today, after handling the same clients for many years, this warm, effective relationship continues to be nurtured by the next generation.

At the same time that we worked together, we have lived within one mile of each other; and our children have grown up together. Doug and Mary have stayed an important part of our lives; and as I retire, I hope this relationship will create opportunities to travel and spend more time together.

As respects the Jewish community, Doug has found an important role for himself in the community, and one that has proven to be successful for both parts of this equation. As president of the Jewish Community Federation, he caps a career of important accomplishments in many of the agencies, following in the footsteps of his father. I am sure others will report these achievements in more detail. My relationship with

Doug has been special, both as to business, family, and volunteer involvement.

When Doug was president of the Federation, he was kind enough to ask for my participation, and I was delighted to share my time with him and help in any way I could during his tenure. It was a very rewarding experience.

I know that Doug is planning to reduce his involvement in the insurance brokerage business and be part of the great retirement world. I look forward to this period and our continuing relationship, and congratulate him for all that he has accomplished in the many years that I have known him.

Robert Levison
Senior Vice President (retired),
Sedgwick of California

San Francisco
January 1997

INTERVIEW HISTORY--Douglas M. Heller

Following his first trip to Israel in 1968, Douglas M. Heller enrolled in the San Francisco-based Federation's leadership development program. Participants were asked to select an internship in one of the Federation's agencies, and he chose the Jewish Home for the Aged because his mother told him they served the best lunches. Doug, as he asked to be called, recounts this amusing anecdote in his memoir, which is part of the Jewish Community Leadership Oral History Project underwritten by the Jewish Community Endowment Fund. This series of interviews with Federation past presidents records the history of the Jewish Community Federation of San Francisco, the Peninsula, and Marin and Sonoma Counties.

In his early Federation involvement, Douglas Heller followed in the footsteps of both his father and mother. Walter D. Heller was Federation president in 1960-1962. And Jeanette Heller was an active volunteer in Pinecrest, now a part of the Jewish Home for the Aged but at that time a separate residence for the well elderly. Doug evolved from intern to board membership to president of the Home in 1991-1993. His Federation presidency followed in 1994 to 1996.

Three interviews with Doug Heller were recorded in the summer of 1996 after his term as Federation president was over. The sessions were held in his office in the TransAmerica Building, where he is senior vice president of the insurance firm Sedgwick James of California. At that time his office was rather bare because the firm was planning to move. However, on the wall there was a shadowy print of a man wearing a prayer shawl. The impression is that the figure is beating his breast. Doug explained it was a gift from Alan Rothenberg, who succeeded him as Federation president. When I asked him what the print said about his reaction to being president, Doug replied, "I can't remember what he said about why he thought it was apropos. My guess is because I took the job quite seriously and worried about it and was concerned and tried to run things as expeditiously as possible."

Douglas Heller takes pride in his people skills. He enjoys being a morale booster and felt he accomplished that at the Jewish Home for the Aged as well as at the Federation. He was one of the first Federation presidents to ask to attend staff meetings. He stated, "I felt it was important that the staff see that the lay people are interested in each of them personally. I established good rapport with all the employees, which I thought was very important, especially at that time because of the retrenchment." The cutbacks occurred prior to Doug's presidency but continued to affect staff morale.

In his interviews Douglas Heller expressed his concern regarding donor option or designated giving. He declared, "I am a true believer that we have to have centralized giving, and the Federation fills that bill. I don't want to see that slip away, and it's happening more and more that people want to designate where their money is going." Doug fears that lesser-known agencies or programs won't get sufficient funding.

When asked if he enjoyed being president of the Federation, Douglas Heller replied, "I have to say I enjoyed the Jewish Home presidency more. Maybe because you're closer relating to people, whereas president of the Federation is a highly political position. Politics plays a difficult role, and I'm not a political animal. But there were times when I was very pleased with the job and the job I did do." He also spoke about frustrations: "Just not getting things done in as quickly or as timely a manner as I would have liked. But I see when there's a committee process it takes a longer time than I'm used to. I guess being in the insurance business either you make the sale or you don't; and in Jewish life it's not a question of making the sale all the time. It's a question of moving along the right road, and eventually you'll get to the end of the tunnel."

Wayne Feinstein, executive vice president of the San Francisco-based Federation, and Robert Levison, Doug Heller's friend and business associate, were asked to write introductions to the Heller memoir. We appreciate their complying with his request.

Eleanor K. Glaser
Interviewer/Editor

Berkeley, California
March 1998

Regional Oral History Office
Room 486 The Bancroft Library

University of California
Berkeley, California 94720

BIOGRAPHICAL INFORMATION

(Please write clearly. Use black ink.)

Your full name Douglas Meier Heller

Date of birth March 28, 1931 Birthplace San Francisco

Father's full name WALTER DAVID HELLER

Occupation Sales Mgr. of Paper Manufacturer Birthplace San Francisco

Mother's full name Jeanette Meier Heller

Occupation Honor wife Birthplace Portland, Oregon

Your spouse Mary Ehrlich Heller

Your children Steven Heller, Susan Heller, Scott Heller

Where did you grow up? San Francisco

Present community Atherton, Ca and San Francisco

Education BA - Stanford University 1953

MBA - Stanford University 1957

Occupation(s) Insurance Broker

Areas of expertise _____

Other interests or activities _____

Organizations in which you are active _____

I FAMILY BACKGROUND AND EARLY YEARS, BORN MARCH 28, 1931

[Interview 1: December 10, 1996]##¹

Grandparents

Glaser: Would you tell me about where you were born and the date of your birth?

Heller: March 28th, 1931, in San Francisco, down at the Dante Sanitarium --it was called sanitorium. It used to be Dante hospital.

Glaser: Are you a second generation, third, or fourth generation San Franciscan?

Heller: I think I'm third generation. I know my father's grandparents lived here. I don't know if they were born here. I think they were, though. One of them might have been.

Glaser: Do you remember their names?

Heller: I think Adele Walter Heller was one, but I'm not sure.

Glaser: Her maiden name was Walter?

Heller: Yes. Walter, right. One of them was Walter. I guess that had to be my grandmother.

Glaser: Was she related to the Walter family that the Sintons married into?

¹This symbol (##) indicates that a tape or a segment of a tape has begun or ended. A guide to the tapes follows the transcript.

Heller: Yes. They were all related, right. Clarence and Rosie Walter and the Ethel Walters were all related to my father on that side of that family, yes.

Glaser: And those were your grandparents?

Heller: Those were my grandparents. On my mother's side, it's much easier to trace. She was a Meier, Jeanette Meier. She was born in Portland, Oregon.

Glaser: Oh, it must be the Meier and Frank store if it is in Portland.

Heller: That's correct. My mother's side is the Meier and Frank Company. My grandfather I don't remember, but there's a picture of me sitting on his knee--they tell me it was me. But I remember my grandmother from on my mother's side vividly because we spent summers up there in Portland, Oregon.

Glaser: Did they come down here?

Heller: Yes, but more often we went up; I have some recollection of my grandmother coming here. But my mother always carted my two older brothers and me up there every summer. That was sort of our summer camp at her house in Portland. My mother's brother, my uncle, always took us shopping at Meier and Frank on Sunday when the store was closed. So, it was a great shopping spree. [laughter] You know, help yourself. My mother outfitted us for next year at school.

Glaser: That's great.

Heller: Yes. One of the best parts is to this day I still have a Meier and Frank employee charge card, which gives me a discount, so we take the family shopping up there once a year. It's not as good as it was when my uncle walked us through and grabbed off the rack, but it's pretty good.

Glaser: That's a large store.

Heller: Now it's owned by the May Company, it's no longer the family department store it was.

Glaser: What are your recollections of your grandmother?

Heller: My recollection is, "what a wonderful lady." Of course, Portland was where I sort of grew up in the summertime with my brothers and other cousins that lived in Portland. It was sort of the family get together every summer. You know, it was where I had my first date, first kiss, learned to drive, first experiences of

life. So I have warm recollections of Portland. In fact, early on in my business career, when I was working for Robert Levison and his father, we almost opened an office in Portland. My wife and I volunteered to move there, but it never happened.

Brothers and Parents

Glaser: Tell me about your brothers, and then I'd like to know about your parents.

Heller: I have two older brothers: Harold, who since World War Two has lived in McMinnville, Oregon; and Robert, who lives in San Francisco. Neither brother has been heavily involved in Jewish affairs. They just haven't ever gotten the bug, I guess, to put it that way. But a year ago Robert was on a UJCC [United Jewish Community Centers] Committee and worked for Camp Tawonga.

Glaser: I suppose they married non-Jewish women.

Heller: Yes, currently, but previously Robert married Jewishly.

Glaser: Tell me about your parents, please.

Heller: Okay, what about them?

Glaser: Well, tell me about your mother first, and then your father.

Heller: As I said, she came from Portland, Oregon, but my father was born and raised in San Francisco. So they moved here, apparently, at an early age because my brothers were all born in San Francisco. My mother was a homemaker in those days. She was involved Jewishly, as was my father.

Glaser: Tell me first about your mother's activities and then we'll go to your father.

Heller: Her activities, as I remember, was something called the Fruit and Flower Mission [the forerunner of the Community Chest]. This goes way back in my memory. I can't remember what they did, but I remember them talking about that at the dinner table. What I do remember very well is that she was involved in Pinecrest, the Jewish Home. It was the first building that the Jewish Federation was involved in for the well elderly. I know she did the decor out there, and that was involved with Pinecrest.

Glaser: She was on the board for the Jewish Home for the Aged, wasn't she?

Heller: Yes, but her primary involvement was with the building and the interior decorations of Pinecrest, which was built on the grounds of the Jewish Home.

Glaser: Was she involved in fundraising for Pinecrest?

Heller: No, not that I remember.

Glaser: And your father?

Heller: My father was always involved in Jewish activities.

Glaser: His name was Walter?

Heller: Walter. Walter David Heller. He was always involved in Jewish activities. His involvement came through a close friendship with Lloyd Dinkelspiel. When Lloyd Dinkelspiel became a president, my father was a vice president. It sort of evolved. My father followed in Lloyd Dinkelspiel's path.

Glaser: Was he also a lawyer, as was Mr. Dinkelspiel?

Heller: No. No, he was not a lawyer. He worked for Fibreboard Corporation, a paper product company. He was a sales manager, I guess that was his title. He subsequently retired from Fibreboard at the retirement age, sixty-five, I believe.

Glaser: Did he do anything professionally after retirement?

Heller: No, just philanthropic activities.

Glaser: That was the era before consultants.

Heller: That's right. [laughter] He didn't consult, true, absolutely right. No, he retired, and he didn't have a lot to do except for his philanthropic activities.

Glaser: Which were what?

Heller: Well, I remember that he was involved with the Jewish Federation, where he was president way far back in the early days [1960-1962]. Prior to that the Jewish Community Center. Then, outside of Jewish life, he was heavily involved with the Boy Scouts of America. He was on the national board and went to their jamborees, as I recall. I'm trying to think what else outside of Jewish life, but that's all that comes to mind. United Way also,

whatever it was called at that time: United Bay Area Crusade or Community Chest, or something like that. Also, the United Service Organization--USO--for a number of years, and the United Negro College Fund.

Glaser: I think Community Chest was the name in the early days.

Heller: He was involved in that. And following his Federation presidency he stayed active for a long time on the National Jewish Welfare Board.

Glaser: According to the Federation board minutes, your father was president from 1960-1962. During that time the United JCCs were formed, there was a dinner commemorating the 50th anniversary of the Federation, a resolution adopted regarding Pinecrest, which opened in 1962, and the board approved land for the Peninsula JCC.

II EDUCATION

Religious Training

Glaser: Tell me about your religious training and your schooling.

Heller: Okay. My religious training is not what they would call religious training today. We were sent to Sunday school, my brothers and I didn't volunteer to go to Sunday school.

Glaser: Nobody does, really. [laughter]

Heller: We were sent, and the option we were given by our parents was that if we wanted to study and become a bar mitzvah, then we could quit. If we didn't choose to go the bar mitzvah route, then we must stay on to confirmation. So, naturally, my brothers and I all chose to go through the rigorous (although it wasn't very rigorous like it is today) training to become a bar mitzvah person so that we would not have to go on to Sunday school any further.

Glaser: Which synagogue did you belong to?

Heller: We went to Congregation Emanu-El. We were living on Thirtieth Avenue, and we always, or most often, went by the streetcar on California Street. We rode down to Arguello, down to Congregation Emanu-El. One Sunday I decided that I wasn't going to get off the streetcar when it stopped at First Avenue. I stayed on and went downtown to a movie on Market Street. Somebody saw me so it was the last time I ever pulled anything like that. I was not a good student at Sunday school.

Glaser: Who was the rabbi when you were going to Sunday school?

Heller: I guess Rabbi [Irving] Reichert must have been at one time. But the person that I became closest to, and my family did, was

Cantor [Reuben] Rinder, who trained me for my bar mitzvah. Of course, it was really easy training in those days. You could sort of mimic what you were told to do.

As a youth I stuttered badly. I was born left-handed and in those days they wanted to try to change you over. Because, I guess, left-handed people weren't as accepted as right-handers. I remember that I had a great deal of speech impediment at that time, and bar mitzvah was a very difficult time for me to stand up on the bimah and do what one had to do.

Glaser: How did you get out of that handicap?

Heller: Well, my mother tried all sorts of things: therapy and speech classes. I haven't gotten rid of it a hundred percent. I still get a little bit nervous, but having all these activities has sort of helped. I've outgrown it, I guess, more than anything else.

Glaser: Is it a matter of being more confident that helps in stuttering?

Heller: Yes. It's having confidence and just doing it enough, you know. Being in front of people has helped me a great deal.

Glaser: Are you ambidextrous now?

Heller: Yes. I can pitch a softball better left-handed, under-handed, than I can right-handed. Certain things I do with either hand. I couldn't write left-handed today. I was scared to pick up the phone and call for a date. I was just inhibited by fumbling or hesitating on the phone. Hopefully, I've outgrown most of it. It's too late now to worry about it. [laughter]

Schools Attended

Glaser: Tell about your schooling.

Heller: Okay. I went to Alamo out in Richmond District, kindergarten through the sixth grade. My parents had sent my two older brothers to Lawrenceville in New Jersey to boarding school for their high school years. It wasn't very successful, sending them across the country to school, but yet they weren't happy with the junior high school or high schools in San Francisco at that time. So it was decided that they would try a more local boarding school for me. So after Webb School I went to Town School, which was a private school.

Glaser: Did you say Webb School?

Heller: No, I got out of order. I'm sorry. After Alamo I went to Town School for Boys. It was just being founded at 2700 Jackson Street. It's still there today, I believe, and still called Town School. That was a private school but with day students.

Then, subsequent to that, they decided not to send me back east to Lawrenceville but to Webb School of California, which was in Claremont in Southern California. Claremont is a small college town adjacent to Pomona, east of Los Angeles. So I was sent there for boarding school for four years and subsequent to that to Stanford University.

Glaser: How did you feel about Webb School?

Heller: I didn't like it. I guess I didn't object enough at the time. My wife was sent to Castilleja, a boarding school in Palo Alto. So we're both private school products. I believe in private schooling but not to be boarders--being a day student is fine. I missed the social aspects of public school. Being a boarder, I think you don't learn the social graces. You don't have the social contacts in high school, which are important.

Glaser: You must have missed your family as well.

Heller: Well, I had to have a lot of dental work done as a teenager, so every six weeks I did come home for a week, what they called a long weekend. It was still not the most pleasant part of my life, as I remember.

Glaser: What did you study when you went to Stanford?

Heller: But I have to conclude one thing before we get to Stanford that did prepare me well for Stanford. I couldn't get in as a regular student, I had to go to a summer quarter first. At that time, if you didn't make it for fall, they asked students to start in the summer to see how well you did. Then you were to stay out the first quarter in the fall until they knew enough new students would not make it beyond the first quarter. Then you could come back in. So I started in summer, but I was well-prepared for college, or better prepared than I would have been at a public school, that's for sure.

At Stanford I majored in economics. The only reason I chose economics was at that time the economics classes were four days a week, and you were finished largely by Thursday late afternoon. So that swayed me to become an economics major. [laughter] I loved being at Stanford because it was close to home and I could

come home on the weekends--so much so that I went back to Stanford for a Masters' after serving in the service subsequent to graduation. This is another story. Do you want to hear a war story?

III MILITARY SERVICE

Korean War

Glaser: I assume you were too young for World War Two?

Heller: Correct.

Glaser: Then perhaps you made Korea?

Heller: I did. I made the tail end of the Korean War. At Stanford there was a group of us who decided we would avoid the ROTC. But you had to do something militarily, so we joined the Naval Reserve, which met once a week on Treasure Island. There was a group of us that came up on Wednesday nights; it was a chance to swing by the house, put on my naval uniform, and go to Treasure Island for a couple hours. We'd started this early in our Stanford career, I guess before the Korean War broke out. What you went over there to do was largely play basketball and horse around for a couple hours. You went on a summer cruise for two weeks, and the cruise always went to Hawaii, so that was a nice place to go.

Naturally that all changed with the Korean War, and so we became more of a military unit on Treasure Island and had two weeks of boot camp at San Diego, which wasn't very pleasant. What was lined up for us was that when you graduated from college, you would have a billet at Treasure Island. So naturally you could live at home, get your military service in, and your military service would be at Treasure Island.

There were a couple of gentlemen (Claude Rosenberg, by name for one) with whom I went all through college who were a year or two ahead of me and had done all this. Claude had arranged, because he was billeted at Treasure Island, that when I graduated I would work at Treasure Island. To make a long story short, after graduation you had to then let your name come up as number

one at the draft board, and then the navy would take you and place you at Treasure Island.

So, having all this arranged, upon graduation I was drafted and then sent to Treasure Island. But I couldn't pass the navy active duty physical because I had high blood pressure, which we didn't know at the time. After two or three tries to pass the navy physical and failing it, my mother even had me go to a chiropractor because they twisted your neck or something to immediately lower your blood pressure. I went from a chiropractor to Treasure Island, and that didn't work.

When the navy gave up on me, naturally my draft was number one, and within two days I was down at Fort Ord as a draftee. The army doctor said, "We don't give a hoot about high blood pressure. You're here, Heller." So, I was at Fort Ord--bingo. So, I had two years of naval experience, which they thought was terrific at Fort Ord, and they made me a platoon leader or something. I had no more experience than the next guy.

Glaser: What was your rank?

Heller: Private, maybe private first class, with two years of laughable navy experience. I went through basic training at Ford Ord. The Korean War was about to close, but it was still going on, and they shipped us right over to Korea. Another war story: I didn't make it to Korea because (this is a part of my life, and I'd like to meet someone as I'll explain further) when they flew us to Tokyo they were in a rush. There were fifty of us, but they wanted us to get Korea as fast as possible. We were in the infantry, and we were all privates or corporals or whatever at the time, but you had to process through Tokyo.

I was in the counter-intelligence corps. It was a desk job; I was never going to be an infantry person. In the processing in Tokyo, a gentleman came up to me, who I wish I could meet again sometime but I never will. He said to me, "Heller." I said, "Yes?" He said, "Are you Jewish?" I said, "Yes, I am." He said, "When you process my station tell me anything you've done sports-wise." I said, "Why? I'm not a professional sports person. I played some; we had a semi-pro softball team at Stanford." He said, "Well, embellish it when you come to my station."

As you know, in the military you go place to place and they ask you certain questions. When I got to his station, I told him about having played softball, which was true. To make a long, long story short, forty-eight of my compatriots went to Korea, two of us stayed in Tokyo. The other gentleman had played

professional football. I never made the baseball team in Tokyo, but at least I stayed in Tokyo for the balance of my tour.

Glaser: He wanted to protect you?

Heller: Yes. He was protecting me, absolutely. And, why, I don't know.

Glaser: Was this a fellow Jew?

Heller: Oh yes, he was definitely Jewish. I saw him for a year. I'd like to buy that guy the best dinner or contribute to whatever--. I'd like to find out his name and have him--

Glaser: He probably saved you from frost-bite.

Heller: He maybe saved my life. How do I know? We lived in Tokyo in a billet that I've since tried to find with my wife when we went to Tokyo. I had to find this place where I was stationed. We were in a compound of our own, being in the counter-intelligence corps. There was one officer and one Nisei, and I was what is called in the navy a yeoman. I was the clerk typist. The officer, whom I have seen subsequently, was a red-headed gentleman by the name of Captain Barrack--not Jewish. He said during football season I was to be in charge with this Nisei, and during baseball season he would be in charge. So, we worked out a very nice arrangement. But this lone Jewish guy that kept me out of Korea, I would like to find again sometime in my life, but it won't happen, unfortunately.

Glaser: Did you have the opportunity to travel within Japan?

Heller: Yes. Although I was in the military, I did travel around the Tokyo area because I was there for a little over a year. We were on the outskirts of Tokyo in a place I'll never forget called Itabashi-Ku. The most important thing was that some years ago when I did have the opportunity to go back to the Orient, I spent a day with my wife on the subway, and I felt my way back to this place with the help of a young Japanese student who saw us stumbling around the area. He spoke some English and understood what I was trying to do. He took me over to his father, who remembered the compound and then walked us right to it. I'm not sure we ever would have found it. It was still there, where I was stationed with about twenty other people. It wasn't a big military place, but I wanted to go back and see it and explain to my wife where I'd called her from so many times and have her see it. So that was fun.

IV BECOMING A FAMILY MAN

Marriage to Mary Ehrlich, June 1955

Glaser: Were you married at the time?

Heller: No. Her parents were all for us getting married while I was in the service in Tokyo, but my parents were against it and wanted us to wait until I came back.

Glaser: Go back further, and tell me about your courtship and meeting your wife.

Heller: Okay. My wife is Mary Ehrlich. Her father was Philip Ehrlich, an attorney in San Francisco, a sole practitioner.¹ He was a self-made man who worked his way through Boalt Law School at UC Berkeley. He was a floorwalker at--what's the old store in Oakland?

Glaser: Capwell's?

¹"My legal vice-president, Philip Ehrlich, Sr., gave unstintingly and unselfishly of himself. We are devoted friends." "Philip S. Ehrlich, Sr. I have mentioned him several times before in this narrative. A distinguished lawyer, named by Boalt School of Law as one of its outstanding graduates and recipient of its gold medal, he early evidenced the quality of his interest and help. He taught me a great deal about unselfish giving, and he also taught me that I was not alone with my burdens. Tall, handsome, silver-haired, a man of quick and dominant attitudes, his perceptions and his aggressiveness served the cause of music well and truly." Philip S. Boone, The San Francisco Symphony, 1940-1972, Regional Oral History Office, University of California, Berkeley, 1978, pp. 94, 157.

Heller: Yes, I believe it was Capwell's. My wife would know. Anyway, he worked his way through law school and was a sole practitioner, as I said, in San Francisco. He did all the work for the Zellerbach family--the Zellerbach paper company--and was very friendly with Ambassador Zellerbach when Zellerbach was U.S. Ambassador to Italy. The Ehrlich's home was on Twenty-ninth Avenue in San Francisco, and I grew up on Thirtieth Avenue. So the saying is our baby carriages collided, but that's not true. I knew my wife a long time before we dated and before we got married and our families were friendly as we were both growing up.

Glaser: So, it wasn't a matter of meeting at school. It really goes back a long time?

Heller: We knew each other in high school, but started dating in college.

Glaser: At what point did you get serious about marriage?

Heller: Pretty serious, I guess (my god, this is so long ago) in my senior year in college. When I was a senior and she was a sophomore at Mills. She was unhappy at going to college; she wasn't a very good student, and she dropped after two years. Mills was where she was as a boarder and not happily boarding.

Glaser: In what year did you get married?

Heller: Nineteen fifty-five. June 1955, right after I returned from the service.

Glaser: So you are married 41 years. That's a nice solid amount of time.

Heller: Correct. Forty-one years.

Children

Glaser: Tell me about your children.

Heller: Okay. Three children: Steven, Susan, and Scott. We're members of Planned Parenthood, that's why it's boy-girl-boy. [laughter]

Glaser: What is Steven doing?

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Heller: Okay, Steven [spells] is thirty-nine. He graduated from Lewis and Clark in Portland, Oregon, and naturally decided to live

there. He has lived in Portland ever since he graduated from Lewis and Clark. So it's like going back to the roots.

Susan, age thirty-seven, originally was married for five or six years and lived in Menlo Park. She subsequently divorced and now has remarried and lives in Truckee, California. She has just recently adopted a daughter. She knew the biological mother, who already had two children. Susan has always wanted children, is very good with children, and has not been able to have children. So that's our second grandchild. I should have told you that Steven had a son by his first wife. He is now remarried, and we have a ten-year-old grandson in Portland named Matthew.

My third child, Scott, has been married five years, and lives in Trinidad, California, just has moved there from Redwood City, California.

Glaser: And how old is Scott?

Heller: Scott is the baby. He's thirty-three. He and his wife, Jocelyn, as I said, have just moved, and we hope they'll have a family soon, too.

Glaser: Well, grandchildren are a great joy. It must be hard to have your eldest grandchild so far away.

Heller: Right. It shouldn't be far away, but, unfortunately, Matthew has had diabetes almost since birth. So we're looking forward to the time that he can take care of his diabetes himself, give himself his own insulin shots. That's going to happen because he went to a diabetic camp this summer where the kids learn to take care of themselves. As soon as he can take care of himself then we can have him fly down here. But we've had to go see him, and there's been some problems with his mother, who doesn't even want him to leave the state, et cetera, et cetera. But as he gets older that will be easier. We'll have more contact with him.

V BUSINESS CAREER

Stanford Business School

Glaser: I want to ask you now about your business experience. I assume after you came back from the war you got started on that immediately?

Heller: Yes. As I said, after I was discharged from the service in 1955 I got married. I didn't know what I wanted to do, so I went back to school. I was accepted at Stanford Business School. My father encouraged me to go because we had the GI Bill, and for a change he didn't have to pay for anyone's tuition. So the government paid for going back to the business school. I got married before business school started, and we rented a little one-bedroom house in Palo Alto to begin our married life, which was a great way to start. Especially in that my wife was not working, and so she was around all the time. The only problem was it was difficult to study at night when she was watching TV, and I'd hear the TV on in the other room. But she was a help in typing papers and things that had to be done to get through business school.

Glaser: That's a pretty intensive course, isn't it?

Heller: No. It's much harder today, I couldn't come close today. But it was a good way to start out our married life; especially in that we had three months off in the summer. We decided to go to Europe for most of the three months off. We rented a car and went all around Europe. We knew we would not have ninety days' vacation at one time for a long time and not after any children or anything. So that worked out well.

The last couple of quarters at Stanford I had taken some insurance courses. I decided that insurance might be a field I was interested in. The very last quarter before graduation I

took a life insurance course from a gentleman who worked for the Mutual of New York Life Insurance Company. My father had bought some Mutual of New York policies on all his children years before, so I knew of this gentleman, and he knew I was a client of his company.

Anyway, again to make a long, long story short, the last week of school he said he was leaving Mutual of New York, and therefore he was changing jobs and had to leave the Bay Area. Did anyone of us in school know, or did our parents, of anyone who might be interested in buying his house in a hurry in Atherton, California? I told him that I might be interested, and we went over and we bought the house. He said, "Well, I have to leave. You're going to correct all the papers. Here's your A in the class. I'm leaving for New York." They literally did leave the house as is, and we packed up their clothes. So much so that their bedroom slippers were underneath the bed when the movers came. My wife and I will never forget that we helped the movers pack. They did leave the house like you would just go to work tomorrow and not come back. [laughter]

Glaser: That's an unusual story.

Heller: So that was how we acquired our first home in Atherton. Naturally, my father (who, as you mentioned earlier, was part of the Walter family which did have homes in Atherton--or one big home that Rosie Walter had) couldn't understand how I could buy a house in Atherton on the east side of El Camino. Actually it was on the east side of the railroad tracks, which none of the old-timers thought was Atherton, in some section today called Lindenwood. Also, they didn't understand how we could buy a house for \$50,000. That was an outrageous price. Well, I guess I should have bought a dozen of them. [laughter] I would have been a hero. So that was our first home. It's unusual just to find a house like that.

Glaser: And fully furnished?

Heller: And fully furnished, but not the way we wanted it furnished. But it was a nice way to get started. It was an easy way to get started.

Levison Brothers Insurance Brokerage Firm

Glaser: How did you enter the insurance business?

Heller: I asked about insurance companies, about insurance brokers. I'd worked summers for a stockbrokerage firm called Kaiser and Company. Lee Kaiser ran for Senator of California way far back. He also formed a company called Insurance Securities, which was one of the early mutual funds that invested in insurance company stocks. Well anyway, he was very helpful in directing me to talk to people in the insurance company side of the house.

My father had a close friend named Robert Levison, who with three brothers had a brokerage firm in San Francisco, Levison Brothers. One of the brothers wasn't active. He changed his name to Charles Lane and was an old time movie actor and lived in Los Angeles. In 1957, Robert, Sr., had bought out his two brothers and I interviewed with him. He essentially agreed to hire me. I don't know if he was forced to hire me because my father was a family friend, but I was actually the second non-family person they hired. It was a twenty-person organization, and it was a great way to learn the business.

Also, at business school we all compared beginning salaries, and many of my classmates went to work for IBM, which at that time was the best employer you could ever hope to work for. I remember being hired at the grand sum of five hundred dollars a month, and that was one of the higher salaries at that time, in 1957. I still tease Robert Levison, Jr., who has been my partner for forty years, that that was a huge sum, and was he making that much from his father? He has refused to ever answer that question. I hope he was making more.

I got started in the business because his father was a great teacher. Plus, we had an L-shaped desk, Robert Levison, Jr., and I, and I overheard all the conversations, which was a great way to teach anybody. I really had a mentor. Also, I went back to insurance school, the Insurance Company of North America in Philadelphia, for the three month period. So that was intensive training as well.

Glaser: Why did you choose the insurance business as a way of--

Heller: Of life?

Glaser: Of life, right.

Heller: It appealed to me as being a business based on personalities. I always liked selling, and this seemed to be a way of selling a service that everyone needed. We didn't have a product to sell. You were selling yourself. You know, our product was available through anybody. You just have to deliver, I think, a better service, become more service-oriented, which was appealing to me.

There's nothing magical about an insurance policy. You can buy the same policy from anyone, but you just have to sell it a little differently; and I was attracted to it.

It's been very good to me all these years. I started out with nothing. I couldn't bring in any business, and Mr. Levison was kind enough to see that. Yet we've been able to grow the business over all these years and merge and remerge and merge again. Financially, it's been very rewarding. I would say a great number of my clients have been twenty years or more with me, so that's been very helpful. They've been very loyal to me.

To come full circle, it's been the type of business that has enabled me to have time to devote to philanthropic activities. I see so many other people that I know would love to devote more time to their philanthropic or outside activities, but their businesses do not permit that. This has been good in that way. Like when I undertook the presidency of the Federation, I went around to my major clients and told them. Most of them are Jewish and understood. I was frank that I might not be here as full-time as I had been previously. They understood that and would be patient and would rely on someone within the office.

VI COMMUNAL INVOLVEMENT

Early Influences

Glaser: How did you get started in your community activities? And did your father play a role as a model for you?

Heller: Yes and no. I really didn't get started heavily, as I remember, until after my father's death. I remember it being talked about at the dinner table--his involvement and so on. But it was more my mother's involvement, subsequent to my father's passing, that I sort of got the bug, I guess you'd say. That came about because of my parents' close relationship with Sanford Treguboff. They had always been close friends. In fact, Mr. Treguboff was married in my mother's home.

Glaser: Excuse me, I thought he was married in Dunsmuir House, the Hellman summer home in Oakland.

Heller: One of the reasons that my family was so close with Treguboff--Treg--is that his second marriage, to Betty Lou, took place in our home in Seacliff. As I said, the families were very close. My father learned a lot, as we all did, from Treg. I know that he had in the initial stages of my philanthropic career a major influence on me, and on my mother subsequent to my father's passing.

Glaser: When did your father die?

Heller: My father died on November 12th, 1966, after a very brief illness. Subsequent to that, I had started doing some things philanthropically, but I was not totally immersed in it until subsequent to my father's passing my mother and Treg invited my wife and me on a mission to Israel. And that really got it started, I would say.

Glaser: What was the year of that first mission?

Heller: That was [pauses], I believe, 1968. Yes, '68 is right, right after the '67 war. We went all throughout Israel, even went down to the Suez and looked across the canal to our at that time enemies, the Egyptians, and stayed the night at an army base. It was an unusual experience that definitely got me hooked on Israel. I think since then I've felt--not being a religious Jew--that Israel has been very important because, I guess, having been there innumerable times (although not as many as Annette Dobbs) how fortunate that somebody in my family turned left instead of right, or right instead of left, and ended up in the United States rather than in Europe, and then might have subsequently had to flee to Israel. As I say, it's a really warm spot to me, and I get pleasure out of going there whenever the opportunity exists to go. But that's how I really got started, if that answers your question.

Jewish Home for the Aged, President 1991-1993

Glaser: Was your first activity in one of the Federation agencies?

Heller: Yes, it was. There was a leadership training that I went through. I guess in those days it was like the Young Adults Division. It was a leadership development course. After completing that course, you were asked to become an intern at one of the Federation agencies. I asked to go to the Jewish Home. Why the Jewish Home? Because my mother told me they had the best lunches, which is true today. Of all the agencies, you might as well go out for the Jewish Home because they do serve the best lunch. They don't have matzoh ball soup anymore, but in the old days they always had matzoh ball soup.

I became an intern at the Jewish Home because of my mother's connection with Pinecrest out there. I just enjoyed that part with the older people. At that time it was more of a Jewish Home for the Aged; today it's strictly a skilled nursing facility. It's not any place that I would recommend anybody to go, unless they really need their type of skilled nursing. When I started out there, it was, you know, a home for the aged. The rule was you had to be able to walk up the seven steps to get in. Today I don't think 98 percent of the residents could walk up the seven steps. There were, you know, people who were ambulatory. It was a real going old people's home and not a hospital type of facility, which it is today. It was just a joy to be out there.

Glaser: Did you get involved in fund-raising for the Home?

Heller: No. Another nice aspect of why I chose that agency and lucked out, was that the Home wasn't in dire straits. It had a corpus of its own, and you weren't involved every year in how they were going to balance the budget. So you could concentrate on activities and making the place a more joyous place for the residents. It was nice. In fact, the only time the Home, in my recollection, has really needed funds was for its most recent capital funds drive, and I was fortunate enough to be co-chairman of the drive. When we built the Howard A. Friedman P-p-pavilion --there, you see my stuttering. But the Howard A. Friedman Pavilion was the crux of the campaign. That's the only time I can recall that we had to fundraise.

Glaser: Can you recall who was the director of the Home when you started?

Heller: Yes. In the initial stages, it was Sidney Friedman. Jerry Levine was his assistant and Jerry subsequently became the director.

Well, the Home was where I got my start. Then, the Federation board, and on the chairs of the Federation, and a lot of that you have listed in your chronology.

Glaser: What did you see as the relationship at the Home between the professional and the lay people, the volunteers?

Heller: Close. The Home, to me, having seen many of the agencies in action and seen them up close and from afar, the Home and its board work very closely together. It's just a warm feeling. It seems like the board people want to come back; old board member reunions are well-attended. There's just a closeness among the alumni that I'm not sure takes place at every other agency. It's just the type of activity and what goes on there that I think fosters the good work of the auxiliary. It seems like a homey atmosphere.

Glaser: Was there any relationship, any coordination, between the Home and another Federation agency?

Heller: In the old days, there was a working relationship with Mount Zion that we had, where if someone needed the hospitalization that we couldn't provide--naturally, that type of relationship. When Mount Zion wanted to discharge somebody for a short-term or something, there was always a bed available at the Home--that type of relationship. But not that I can recall any other.

Glaser: Any with the Jewish Family and Children's Services Agency?

Heller: They would refer cases, but not like--. Now, they're working on a very close relationship with the Family Service Agency. When the Scott Street Project gets going, there's going to be a well-elderly housing project. Sixteen hundred Scott Street is supposed to be a housing project like Menorah Park, and that will then, hopefully, have a relationship with the Home.

Glaser: When did that get started?

Heller: It's just in its infancy stages, now. The 1600 Scott Street Project is being worked on while we speak. They're trying to get some land that Mount Zion Health Systems, I believe, controls, to build a project at 1600 Scott Street. It will have I don't know how many units of housing, plus hold the offices of the Jewish Family and Children's Services.

Glaser: I hadn't heard about this.

Heller: Well, it's a brand-new--on the drawing boards.

Glaser: And this is the Federation project?

Heller: The Federation will be part of it, I assume.

Glaser: That sounds wonderful.

Heller: Yes. It should be a good project for the future.

Glaser: Did you assume any leadership role at the Jewish Home?

Heller: I had two stints on the board. In the first time around, the last year they might have made me secretary. I was on the board for whatever the term is out there, I can't remember, six or eight years. Then I had to get off the board for a few years, and then I came back on and eventually became president the second time around. As Jerry Levine said, I needed schooling. The first years I was a youngster, and the second time I knew more about the jobs. So the second time I became president, eventually, which was good. I think that was a great way. I was young and not dry behind the years the first few years, so--.

Glaser: That's a little insulting, isn't it?

Heller: Well, no, the second time it was much better.

Glaser: Who were some of the other volunteers that were on the board?

Heller: At the Home?

Glaser: Yes.

Heller: My goodness. I had experiences with all the previous presidents. Okay, Franny Green was president early on out there, I remember. I think prior to her presidency at the Federation she was president out there. Doctor Julian Davis, I remember; Bernie Rainer. I'm trying to think of the picture on the wall out there.

Glaser: Was it Bill Lowenberg?

Heller: Bill Lowenberg, right. I think he was president, yes, as well as the Federation. So many of these people--.

Glaser: And Harold Dobbs?

Heller: Harold Dobbs, absolutely. I'm thinking of past presidents. Dick Rosenberg, and now today his wife Barbara. There must be more, but I can't recall.

Glaser: Did you help recruit other volunteers?

Heller: For the Home?

Glaser: Yes.

Heller: We never had problems recruiting volunteers at the Home. Yes, I did recruit some great people that I found: Allan Byer. He'd never been involved Jewishly. Allan Byer is a dear friend a major client, and a gentleman I've known since he started his own business in San Francisco. I take credit for getting him involved out there. He has been a great friend of the Jewish Home ever since. I don't think anybody else comes to mind on that. I'm sure there are others, but he stands out.

VII EARLY FEDERATION ACTIVITIES

Young Leadership Cabinet and Fundraising##

Glaser: What was your activity with the Federation itself?

Heller: I think it was when I became a member of the Young Leadership Cabinet. The Young Leadership Cabinet was through the Federation, but it was potential young leaders from throughout the United States and met a couple times a year. The organization is still in existence and it's grown fabulously. And all the Federation's young up and coming people have been or are members of the Young Leadership Cabinet.

In its infancy stage, Jerry Braun and I, as I remember, were the two old-timers that were part of this organization. We went back to a couple of the national meetings. At that time, the head of the cabinet, as I remember, was Rabbi Friedman, who was a terrific solicitor. He taught the art of solicitation, and I'll never forget some of his tactics. When you went to these meetings, you knew you were going to be solicited; and, boy, they really solicited you one-to-one. They put the screws to you, soliciting.

It was interesting because out here we never solicited the way they do back east. I remember when Don Pritzker moved here, we tried card calling a couple times down the South Peninsula, which at that time they did all the time back east. You stood up amongst your peers, and if you wanted to belong to XYZ country club you had to give a minimum gift. Out here, we never took the gloves off, and card calling never was successful in the West, or at least in the Bay Area. That's how I learned to solicit, and that's, again, where I got an early Israel bug: through the Young Leadership Cabinet.

Then I came back and was appointed to the board of the Federation. I worked on various committees, and did some fundraising and soliciting, and the South Peninsula became a group unto its own. We always had a South Peninsula dinner that my wife and I worked on in Nat Starr's era--another name I'm sure you had. He was a South Peninsula staff person assigned by the Federation. We worked on annual dinners together. It was just a way to get to know people.

All this helped in my insurance business. It's just amazing. At one of our Federation retreats, I believe when Franny Green was president of the Federation, we had an overnight in Asilomar, one of the early retreats. She introduced me as her insurance broker; I'll never forget this story. After the meeting, a gentleman by the name of Herbert Ginsberg came up to me and said, "Doug, I didn't know you were in the insurance business. I own a metals company in South San Francisco." We started chatting, and I became his insurance broker, for which I've always kidded Herb Ginsberg and Franny Green. I say, "Keep introducing me as your insurance broker. It has more meaning than a member of the Federation." My philanthropic activities have really opened some doors to me for business opportunities, so it's been good.

Glaser: How did you feel about soliciting people for their contributions to the Federation?

Heller: I was in the early days hesitant, fearful, frightened. Nowadays, having been to innumerable Super Sundays, I guess I'm not scared to pick up the phone and call anybody because I believe in the cause so much.

Again, if you have a good story to tell, it makes soliciting very easy. You're not always going to clean the cash register, but I guess that's the same thing I've learned in the insurance business: you're not going to make a sale every time out. In fact, early on in insurance Robert Levison, Senior, made me go out and do some cold calling on Market Street, which was terrible. In fact, I used to go up there in the fifties and walk in and out of a couple of stores and be turned down cold. I'd end up going to a movie, especially the Telenews on Market Street for an hour, [laughs] because I was so turned off by having to make cold calls. In fact, to this day, I tease people. I say, "If you go to an afternoon movie on Market Street (because that's where the movies were in those days), when you leave the theater walk out backwards and look up at the marquee. If anyone sees you, you can say you were just looking at the marquee."

[laughter]

Glaser: You had your alibi all figured out.

Heller: Always walk out backwards so it won't look like you were just leaving the theater. [laughter] I've been to a couple of those movies, I'm frank to admit, because he sent me out cold calling.

So I think that helped, plus going to these Young Leadership training sessions was very helpful. There was another gentleman who was an expert solicitor that the UJA [United Jewish Appeal] in its early days sent out here. I forget his name, but I'm sure someone else has mentioned him to you, especially Jerry Braun and others would remember him. I know that Brian Lurie would know his name, too. He was a professional solicitor from the UJA who taught us that the best way to solicit is to sit down next to the person, put your hand on his wrist, establish the warmth between the two of you, and it works.

Glaser: You mean literally to make a physical touch?

Heller: Literally touch and feel. Yes. Literally touch and feel.

Glaser: Is that right?

Heller: This guy was a master at it. We don't do that much today, but in those days it was very helpful

Glaser: I have heard that for substantial givers two should go together because two is community.

Heller: Right. Yes, absolutely. Two on one is the best if you can pull it off. And being president of the Federation, I had the opportunity and the pleasure of soliciting our major givers with Wayne [Feinstein] in the two years I was president. The people you get to know and solicit are one of the joys of the job. It's not difficult work because they are so open and they ask leading questions. They've done their homework.

Glaser: There's no pulling of teeth to get the money?

Heller: No, there's no pulling of teeth. There's nothing. I mean, soliciting people such as Peter and Mimi Haas--it's wonderful. They are so well read and up to date on what's happening currently. I wish everyone could have the pleasure of soliciting the major givers of the Federation.

Glaser: That's very interesting.

Heller: Of course, if they don't believe in the cause, it makes it very difficult. I guess I solicited before becoming president. I

guess I'd done enough solicitations not just for the Federation but while I was on the board (it seems like years ago) at Camp Swig. We did solicitations for that camp when we were trying to raise money many years ago. Now, Camp Swig has a second campus near Santa Rosa and maybe, some day, a retreat center will be located there for use by the entire Jewish Bay area. So, you know, if you have a good story it's very easy, in my opinion anyway; and usually you have a pretty good story to tell.

Committee Assignments

Glaser: When you became active in the Federation and took on committee assignments, were you appointed to those or did you choose committees?

Heller: They were largely appointed, but you could ask. I think all Federation presidents ask board members, and sometimes a number of members, to serve on certain committees. As president you try to put them where they wish to serve, if it's at all possible. Sometimes you try and do it because of their expertise. I know I was on the insurance committee years ago. In the sixties, I believe, Levison Insurance, which we were then called, had the insurance for the Federation. We did the insurance work for the Federation in cooperation with Richard N. Goldman and Company. So the insurance committee was a natural place for me to work. Then I was appointed to the personnel committee of the Federation, and the budget committee, and various other committees. Then I got to see, you know, how the Federation worked, which was very helpful.

Personnel Committee

Glaser: What did you do on the personnel committee?

Heller: Well, we talked about holidays. I was always, in fact still am known down there as, "Why is the Federation closed for all of these Jewish holidays and then we're closed for the secular holidays, as well?" And, "When businesses operate five days a week, why are we closed for the week from Rosh Hashana to Yom Kippur?" You know sometimes you have to do what you have to do.

Glaser: Did you set salary levels?

Heller: No, we talked about salary levels, we didn't set them. We talked about setting up procedures. Businesses today have to have certain guidelines and in the old days you had more flexibility. But it was hours and holidays and salaries and reviews--how many times a year was a person supposed to be reviewed and what was to be accomplished. This was before the days of human resource personnel, so we looked at other businesses and how they did things and so on. We tried to become more of a business as the Federation grew.

Budget Committee

Glaser: And you were also on the budget committee.

Heller: Yes, the budget committee, and so I got to hear the agencies come in. In that time, it's still done a little bit, all the constituent and beneficiary agencies come before you and talk about their budgets and their needs for funds.

Glaser: It must have been difficult because you have a pie that you've got to divide up.

Heller: There's always more needs than there is pie. You can only cut the pie so many ways, and it's hard to say cut this program, and why is this program better than some other program. Coming to current, one of our goals during my term as presidency which is finally coming to fruition and will be acted on at the board meeting this very week, in December '96. The Federation is establishing some priorities for its planning, having priorities established by the planning and allocations committee. This is the first time I think that's ever going to be done. It's taken a long time, two years that I know of, to come into being that we will have some priority. The planning and allocations committee will set some priorities so that the agencies that are involved in the highest priority will get the first look at some funds.

Glaser: I'm surprised that wasn't done earlier.

Heller: That's one of the frustrations I have found at the Federation, and I guess it's true of any company that's run by committee. This one is run by committee process, and it takes a long time to make a change.

In fact, when I assumed the presidency of the Federation in June of '94, my inaugural address, if you can call it that, was about change that both Wayne and I felt had to happen. And it

has taken two years for many of the changes to finally come into being and to take place. But they have to go through the committee process, and I see it's true of lots of philanthropic organizations. It's very hard to change. Both professionals and lay people resist change.

Allocations to Agencies

Glaser: How do you feel about the agencies raising money on their own aside from Federation allocations?

Heller: I understand the need for it because they have their problems. However, what I'm scared of is that they're going to become more like United Way, which is an absolute failure in my opinion. It has gone completely away from the idea of a central community giving. I'm a true believer that we have to have centralized giving, and the Federation fills that bill.

Having said that, donor option is here, and when the donor wishes to direct his money to a certain agency or a certain program, we have to be cognizant of that and listen to that donor. That's why the priority-setting process, I think, has become so important. If we go completely to donor option, the lesser-known, unknown agencies, unknown programs that don't get the PR will never get any funds. Then that will be the end of it, and it will be the end of the Federation.

Most importantly, so many of our donors know that we do our homework on all aspects of Jewish life. They're happy with the way we distribute our money and understand that we study these agencies. We study their needs and so they're happy to give us money, realizing that we are the central agency, and that we will distribute the money properly. I think that's most important, and it's especially really important with the endowment side of the Federation. People are going to leave the Federation money in their wills and through their estates. We have to continue the Federation to spread that money out from a central place.

Glaser: If there's designated giving, there's really that much less need for the Federation.

Heller: There will be no need for the Federation, and that is what is a great concern to me and I think to the Council of Federations, let alone the San Francisco Federation--that we won't need to exist. I see more and more that the agencies are setting up, or

have set up, their own fundraising staffs, and some of them have set up endowment staffs. Some have set up staffs for public relations that are bigger than the Federation staff. I know there is competition for philanthropic dollars, but that's why it's most important that everybody comes under the central tent.

I know that the current Federation president, Alan Rothenberg, is trying to get the temples more involved with Federation, and I know that Wayne and I began this togetherness. I know Alan is continuing it--meeting with the rabbis to try and do more coordinated activities, even though each has to have its own fundraising ability because they can't exist without their own fundraising. We really have to balance both these things.

Relations with Synagogues

Glaser: Several other past presidents have talked about relationship with synagogues and rabbis, so I get a feeling that this is something that has to be worked on. Is there something that doesn't go together between the Federation and the synagogues?

Heller: Historically, I would say, there has been some friction. At the Federation we've always tried to have a rabbi or two on our board. I have found all the rabbis that I've worked with to be very cooperative, and be really a plus on the Federation's board, and on the board of Temple Emanu-El as well. So, I don't know why we haven't been able to glue the two together, each temple or all the temples together, more than we've been able to.

Glaser: Is it a conflict for community funds?

Heller: Yes, it's a conflict for the funds. It's a conflict because the Federation has to encompass both the Orthodox, Reform, and the Conservative. So, that's a great many temples. Sometimes, I guess, the three persuasions don't see eye to eye amongst themselves. So, here's the Federation. We can't come between the Orthodox and the Reform, we don't want to. We don't want to go down one avenue without equal time and equal money to the other avenues. I know this has been a concern with Camp Swig, which is a Reform camp that I feel close to. The Federation would like to be supportive, but yet we have to watch ourselves and not be overly supportive to Camp Swig, a Reform camp, but be as supportive to the Conservative camp as well, and probably the Orthodox camp also. So, that's the tight line the Federation has to walk. Maybe that's a problem, but I think as time goes on you're seeing more and more of the synagogue-Federation

relationships working. There's a task force that's working on this.

Lloyd W. Dinkelspiel Memorial Award, 1971

[Interview 2: December 19, 1996]##

Glaser: You haven't talked about the Lloyd W. Dinkelspiel Memorial Award that you got in 1971.

Heller: Okay. That was my first introduction to the Federation, as far as getting the award. It was unusual in that it pleased my mother so much that she had a heart attack. I think it caused a heart attack.

Glaser: Are you serious?

Heller: Well, yes, she died the next day. It's nothing to laugh about, in fact, my wife remembers it more than I do. I think it was a culmination of a bunch of things medically wrong with her. She was at the meeting at the Fairmont where I was honored and then, as I said, subsequently passed on. So it was good that she was there because the Dinkelspiel Award had come after my initial trip to Israel, which was with her and with [Sanford] Treguboff. So that part was, you know--. It was just unusual the way it happened.

Well, I was pleased to get it in that it was only the second time it had been given out. At that time it wasn't given out every year as it is now, so it had much more meaning, I think. Now, I know, in some cases they have to dig pretty deep to find a person to honor. Jerry Braun was the first student to get it, and I was the second. It was meaningful. It sort of got me started with the Federation.

Glaser: What had you done that they gave it to you, if you say that you just started?

Heller: I guess I had been on many committees. I had gotten involved in fundraising, and had gone through the chairs of the Young Leadership Cabinet, which we talked about last time. I had gotten involved and been on a trip to Israel and had come back enthused. Both my wife and I spoke on behalf of Jewish causes because of our trip, and she was even involved, so that made it close to us. It was something that our family was doing.

VIII ON FEDERATION BOARD

Treasurer, 1973

Glaser: One of the things that you did take on was to be the treasurer of the Federation.

Heller: Correct, but at that time our offices were on the same floor as the Federation at 220 Bush Street, so I was a very easy check signer. They didn't have to go very far. I think that was why I was anointed as the treasurer: I could sign checks, being right across the hall from their offices.

Glaser: Are you saying this out of modesty?

Heller: No, no, no. Being treasurer or secretary or one of the lower echelon officers of all these organizations, is largely a title and not much responsibility because the president carries the weight and does the work. The vice presidents are there only if something happens to the president or he or she has to miss a meeting; but I think the other officers are strictly--. It's a title without much responsibility. I was convenient, and since then I've been treasurer of other organizations, and you're there to sign checks and put your name on some documents when they don't want to have the two pros sign.

Finance and Administration Committee

Glaser: Is that your attitude as far as being the chairman of finance and administration committee?

Heller: Largely, but there you're involved with the pro as far as setting up some sort of procedures. You're going over their annual

statements and you meet with the auditors. So there is something more to be done, but largely ceremonial, I'd say.

Day School Committee

Glaser: At the same time, you were also on a day school committee. That sounds very important because there was a period of time when the Federation was considering the extent of its support for day schools.

Heller: For education, right. We were criticized early on or about this time for not supporting Jewish day schools and education, certainly not nearly as much as the Federation does now. In fact, one of those times, I can't remember the exact year, the Hebrew Academy picketed the offices of the Federation. Again, because our insurance office was on the same floor at 220 Bush Street (they occupied one half the floor and we occupied the other half) when the students came down from the Hebrew Academy to form a picket line, it was right in front of our front door as well.

We did meet, and I guess I was on that committee that met with Rabbi Pincus Lipner of the Hebrew Academy. So the board of the Federation at that time wrestled with how much money we were going to allocate to the various day schools. As the years passed, the Federation has increased their allocations to all of the Jewish day schools in the Bay Area.

Glaser: What is your own opinion about Jewish day schools?

Heller: My own opinion is that they do a very good job. I think, as we've learned the hard way, they are needed. Especially with the public schools not being in the forefront, more and more people are going to private schools, and these schools do fill a bill. On a personal note it's interesting, not being a religious Jew, that our grandson goes to the Portland Jewish Academy, which is the Jewish day school in Portland, Oregon. So it seems like what comes around goes around, or whatever that saying is. I now have a grandson in a Jewish day school. His worst course, I might add, is Hebrew. He's flunking Hebrew, but I don't think that's so important as long as he gets his reading, writing, and arithmetic proper.

Campaign Chairman, 1975

Glaser: Tell me about the time that you were the campaign chairman in 1975.

Heller: Okay. I guess it was Brian Lurie's first year at the helm of the Federation--first or second year. Brian said that naturally I had to be the first one to make a gift for the drive. He solicited me rather heavily, as only he can do, and he said it had to be a significant gift. I remember that I pledged \$100,000, not knowing any way how I was going to pay it off. Brian said, "Well, don't worry about that," in his typical fashion. "You know we'll work that out or you'll find a way," or something. I can hear him soliciting that same way today. At that time my gift and others that followed started a very successful campaign. At that time I think it was slightly in excess of \$7 million, but it was considered a good campaign. When you look at it today, when the Federation raises almost \$20 million, or slightly over \$20 million, it doesn't sound like a big number, but in those days it was.

Glaser: How did you organize the campaign?

Heller: I guess in the traditional manner. From top down you find the right people to fill the key slots. At that time we had various dinners, I remember. The South Peninsula, for example, had its own dinner and we solicited people at the dinners. I think that was done throughout the region of the Federation. It was just a regular way of going about it. Now they figure big dinners raise small money, which is probably true today. But in those days it was a way of getting people to come and we featured a speaker and raised money.

Glaser: Did they have Super Sunday Telethons in those days?

Heller: No, Super Sunday came much later. It was largely face-to-face or telephone calls. Solicitation wasn't done, I would say, in the sophisticated manner it is today.

Glaser: You say that the dinners didn't raise very much money?

Heller: Well, we thought they raised money; but it's been proven since then that dinners are nice social events, but you have to have the personal. You know, sit down with the person one-on-one or two-on-one, and do your fundraising that way.

Glaser: But aside from fundraising, would these dinners be a way of getting people to feel more attached to the Federation?

Heller: Absolutely correct, especially in the South Peninsula. I know my wife and I worked on a number of dinners in this era, and it was a way of getting people connected, telling them about the Federation, in that the South Peninsula was one of the first regional developments of the Federation. It was a way of getting people to know about the Federation. At that time they didn't have the South Peninsula Council and didn't have a South Peninsula office as they do today. So it was a much smaller way of doing things, but it was a start.

Glaser: Was there any money obtained from Silicon Valley? Or was that too early?

Heller: No, it was too early. No, we didn't. Silicon Valley was not a presence as it is today. It was just people who lived or worked on the South Peninsula who came to these dinners.

Fundraising Committee

Glaser: Coming closer to when you became president, you were on various committees of fundraising, investment, and cash collection sub-committee of the capital funds. Would you talk about that? You seem to have had a major activity in fundraising.

Heller: Well, that was always the major thrust, still is today. People that I admire, like Don Seiler, say if we don't raise the money, we don't--. You know our main reason for being is as a fundraising organization, and everything else that we do sort of follows from the fundraising efforts. So that, I always felt, was the key. If we don't have the money, we can't do any of the things that we want to do. So we're always looking for, "How do we raise more money."

I know our programs and our outreach and all that are very important. But, again, money is the driving force here, and that's why I'm concerned about the future of the centralized giving. I don't want to see that slip away, and it's happening more and more that people want to designate where their money is going. I still think there is a need for a community federation. The other committees were all adjuncts of the fundraising committee. They were all part and parcel, like the investment committee--how do we best invest the money that we do raise and make it grow. It was the beginnings of the endowment side of the Federation, which has grown tremendously and is very much needed.

Glaser: And you were on the endowment committee?

Heller: I have been, off and on. I think I've served on almost every committee at one time or another of the Federation, which was a terrific background for becoming president eventually, in that I'd had experience at least at some time in my career on one of the committees and many of them more than one time.

Endowment Fund Committee

Glaser: Well, before we go on to talk about your presidency, tell me what you did on the endowment committee. It's broken down into sub-committees. How did you serve on that?

Heller: With the endowment committee, on the sub-committees that you mentioned, you get to review the various proposals that have come in from agencies and other organizations that wish to apply for funds from the endowment committee. So, again, it gives you a broader perspective of things that are going on in the community that you might not be aware of that are asking for Federation support.

As you mentioned, it's important to note that many of these smaller organizations that apply for endowment funds would never receive a dollar if there were no centralized community federation because they're not well-known. They don't have people of stature serving on their boards; therefore, they would never receive, in my view, a nickel of designated gifts. So here again is a reason why the Federation must be a central organization, must have money to give each year.

Glaser: Which of the sub-committees of the endowment fund did you serve on?

Heller: I can't remember their specific names, but I would bet at one time or another on each of the sub-committees, whether they deal with cultural affair or education. I'm trying to think of the ones today that they have, but--. There's only two or three major sub-committees, and everyone is asked to go to a couple of the meetings of the sub-committee and then, naturally, come to the big meeting.

Glaser: In 1989, there was an implementation committee that proposed a new planning and allocation structure. I think you were involved with that. Will you tell me about that?

Heller: Is that when it started?

Glaser: I think that came out of the demographic study, or did that come out of the confederation study?

Heller: Yes. There was an attempt to make a confederation. I think Brian Lurie started that attempt. It never happened, and I don't think it ever will happen, although it was a good idea. In fact, to my thinking, the only way it's happened to date is that Jewish Bulletin, at least, is publishing for the whole area--for the East Bay and the San Francisco Federation area. I don't think it extends to San Jose, but we did try to have a confederation. Nothing has come of it, and I don't think ever will. Everybody wants their own autonomy, so I don't see anything happening there, but there was an attempt.

Glaser: Did the implementation committee come out of the demographic study?

Heller: I can't remember. I don't know.

IX FEDERATION PRESIDENT-ELECT

Period of Orientation

Glaser: Before you took over the presidency--and perhaps you should talk about what led up to being the president--did you have the usual president-elect status for six months before becoming a president?

Heller: I did, but that was all I had. A couple of years prior I was not part of the Federation. I was devoting my efforts to the Jewish Home. I had just completed my tenure as president of the Jewish Home and was taking a leave of absence from philanthropic activities when the Federation approached me to become president. So it wasn't like I was prepared, or had been a vice president of the Federation, or whatever.

I had been away from Federation, except that I'd been to board meetings as president of the Jewish Home. All the presidents of the beneficial agencies are invited to the Federation board and are ad hoc members of the Federation board. So I was aware of what was going on, but to be asked to be president of the Federation came out of the blue to me. I was not prepared for it and had not been programmed to become president. So it was an honor to be asked. I had to check with my employer if I could have the time to devote to the presidency. I got everyone's blessing and that's how that all happened.

I didn't anticipate it or expect it. Just like I didn't' anticipate or expect being president of the Jewish Home so quickly because there you sort of knew a few years in advance how the rotation was going to develop. But Don Seiler, in particular, who was in line to be president prior to my presidency, was called away from the Home to be president of the Federation. So that moved everybody ahead a couple years at the Jewish Home. Timing, I've always felt, is very important in

life; and my timing was perfect, both at the Jewish Home and at the Federation. It was wonderful the way these things worked out.

Glaser: If you'd been away from the Federation except for attending some meetings, did you feel the six months that you had as president-elect was helpful as an orientation period?

Heller: Yes, very helpful. It's terrific the way that has been set up now, and I would hope that would continue. I think it's been somewhat copied by other agencies. It's good because you get to be at all the meetings where the president is, and Cissie Swig bent over backwards to include me in everything. So you're ready to step in when that time comes.

Trip to Tashkent and Israel

Glaser: And you went on a very interesting trip with Cissie.

Heller: With Cissie and Wayne. In the early break up of the Soviet Union, we went to Tashkent and [pause] I'm trying to think of the country. Well, we flew through Istanbul and then transferred and went to--

Glaser: Uzbekistan?

Heller: Uzbekistan. [spells] The purpose of the trip was to follow some emigrés getting out of the Soviet Union and then go on the El Al charter flight with them to Israel. It was just a very short, fascinating trip. We met with the emigrés in the Soviet Union, and then stayed with them throughout their last few days in Tashkent, where they all had come together, then we went on the same charter flight with them to Israel. Seeing them land in Israel and how quickly they go through customs. The next thing is they're off to their ulpans, or whatever, to become Israeli citizens.

Glaser: How long a trip was it altogether?

Heller: I think three or four days, if that. I can't remember. It was very quick. I think two nights in the Soviet Union, and then hardly a day in Israel, and on the way home. It was quick. It was informative.

Glaser: It was informative even though it was so short?

Heller: Oh, yes. All these missions seem to be short, the ones that I went on. This was all prior to having an official overseas committee. They were three or four day missions. The prime minister's mission and other missions were two or three days. You don't have time to get acclimated, which is good, or sleep, which is even better. If they keep you on the go, it's terrific. It was fun. If you go, you have to go with the right attitude, and I think most people do. So that was very informative.

That trip was unusual. You always have experiences flying in a Russian plane with Russian pilots, you know. We were such a small group; we had met with some other people, naturally, in the Soviet Union, but there weren't ten of us, I don't think, total. We went to Samarkand and flew to one or two towns and the planes weren't the best. When El Al took off from the Soviet Union, I was very pleased to be in an El Al aircraft. [laughter] We flew from Newark, New Jersey, to the Soviet Union on Turkish Airlines. If that was their first class, which we had, it wasn't as good as whomever's tourist class.

Glaser: I didn't even know they had an airline.

Heller: Yes. It was an experience, which all these things are. Fun to look back on.

Financial Problems

Glaser: Before you took over the presidency, the Federation had had two consecutive fiscal years of retrenchment. What was the effect of that on the Federation?

Heller: The morale of the staff was, I would say, on a low ebb because there had been cutbacks and there had not been salary increases. People were concerned that there were going to be further cutbacks--were they going to have a job the next year? So it was not a happy time at the Federation. I was glad that we could overcome some of the employee fears and at the same time keep the budget in line. I guess at the end of my presidency we had found some money so that we didn't face further cutbacks. Everybody was concerned about their job, and I know that affected their work. It made fundraising and the other things that the Federation does harder to accomplish when the morale is not as good as it should be.

Glaser: Was there enough staff to have effective campaigns?

Heller: Yes. When you retrench, it's always frightening for a moment. But when people get more settled in what they're doing and they see that they can handle it, then I think that we did have enough staff. But it's nice to know that now we are beyond that, and that the morale has improved. I think I was one of the first presidents to ask to attend staff meetings, and I attended them. I felt it was important that the staff see that the lay people are interested in each of them personally. I established good rapport with all the employees, which I thought was very important, especially at that time because of the retrenchment.

Glaser: So you were a morale-booster?

Heller: Right. I would say that is true, and I enjoy doing that. I think I'm good at it. I know I accomplished that at the Jewish Home, so I felt I could do it here as well. It's very important that the employees know that the lay people are taking interest in them personally.

X PRESIDENT OF THE FEDERATION, 1994-1996A Call for Change

Glaser: Very early in your first year, perhaps the first or second board meeting of your presidency, you challenged the 1994 board to change: to change in the way it presented itself and in the way it did business. You wanted the Federation to be more coordinated and to be more aggressive.

Heller: Right. The very first thing I changed at the board meetings was the way the room was seated. So you talk about change. The board room is a difficult room for people to feel close. The president and Wayne and those who were primarily involved in the meeting sat at one end. The people you were talking to were further away. So I had the idea to move the president and Wayne's station to the middle of the room, and I've noted since that most all meetings are now set up this way. So I take pride in that, and I think that people are closer together. When you have a forty to fifty person board, I think it's important that people feel part of a meeting, even though much of the meeting is by rote, or the committees have decided stuff. If there's not going to be a lot of participation, it's still important that the board members feel part of the process, and this has been accomplished.

Glaser: You take pride in your people skills.

Heller: I do. Yes. I think that's putting it succinctly and it's correct. I do. The business that I'm in is a people business. To me it's warm and fuzzy when I go back to the Jewish Home or back to the Federation and the employees embrace me. It's a warm feeling. I think that's important today, when you're only going to be president, or whatever the title is, for a short period of time.

Glaser: How did the board members react to your challenge of change, to be more aggressive and more coordinated?

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Heller: When an organization is run by committee, it takes a long time to make changes. When you're the driver of the bus, it seems like you can't make the change as quickly as you want to because it has to go through the committee process. One of our early challenges was to set up priorities through the planning and allocation process. It's interesting to note that the board finally approved the changes that we tried to institute, or started to years ago, at the most recent board meeting in December, 1996. So that just gives you an indication of how long it takes to make some changes.

At least the changes are well thought out and bode well for the Federation for the forthcoming years. It just seems like it takes forever to get something done. That's what I tried to prepare the board, and the Federation members, actually, for. That we can't do things the way we've done them historically. And I'm glad to see this is now taking place--

Financial Integration and Financial Resource Development

Glaser: One of the things you wanted to do that early was to integrate the financial resources of the Federation. They come from the campaigns, the capital campaigns, the endowment funds, and the special projects.

Heller: Right. We're making progress on that front. I still feel, at times, the Federation is operating two different companies, if you will: the campaign company and the endowment company. But there's progress now in that certain requests for allocations are going through both the endowment and the campaign divisions, and there is more coordination than there was. But there still is need for closer cooperation and a closer tie-in between campaign and endowment.

Glaser: Gary Tobin suggested the Federation present its purpose as the only organization that represents the whole Jewish community: local, national, and overseas. He emphasized the importance of stressing annual campaigns as a community-building activity. Was this one of the reasons for mailing to contributors the annual report of the planning allocations committee?

Heller: Yes. I believe that was one of the reasons. Just to let our givers know, again, how many different agencies and causes the Federation supports. If you only read the Jewish Bulletin or some other Jewish press, you're not going to hear about the smaller organizations. You're only going to hear about those that take out advertisements and those that have staffs of public relations people. The smaller organizations are going to be forgotten. Whether they're national or local, we can't forget these organizations. So it is important that the centralized agency be the Federation.

Glaser: Did you get any community feedback on sending this out?

Heller: As with any other mailing piece or whatever, you get positive and negative feedback but it was largely positive. I think one of the main jobs of the Federation is to keep educating our constituency, and we hope to keep doing that. I know most presidents have tried to do something innovative to keep what the Federation does before our donors. We've tried newsletters from the presidents, items that say, "From the desk of the president." Anything that we can get the good things that the Federation does before our Jewish people is important. That's why I'd hate to see the Federation be diminished in size over the years because it will soon drift away and the only thing we'll have left are the constituent or beneficiary agencies, and that won't be healthy.

Glaser: You had a number of new projects and developments during your administration. You've already mentioned the priority-setting process. Another one was the financial resource development committee. That was to articulate the Federation's vision for the nineties.

Heller: Right. All this relates to my "inaugural address" when I talked about changes that had to happen and are happening, and the financial resource development committee was one of those changes.

A few of us on that committee, chaired by John Freidenrich, went on a tour to New York and to Chicago to see how their federations were getting involved in this financial resource development, and they had undertaken campaigns. As an outgrowth of this, not just our financial resource development ideas are changing but our capital funds committee is changing. In fact, it's changed its name to the capital development committee because it does not fund.

We're setting up processes for the agencies, of which we have many that are contemplating capital projects over the next

five to ten years. A process of going through various steps to insure that the capital funding is necessary, that the project is needed. Setting up steps so we hopefully won't have problems down the line in building new capital projects. All this is relating to changes the way Federation operates, and, I hope, for the better.

Glaser: Did that relate, in terms of setting priorities, to the allocations and priority-setting committee?

Heller: It's all related, yes. All this will tie together in that naturally the capital funds or the financial resource development is all related to the priorities in that hopefully we can sell our story to major donors of why funds are needed. And then we'll tie into the priority-setting process of the items we feel are of top priority.

Human Resource Development Department

Glaser: When was the human resource development department established? Was that during your administration?

Heller: No. It was some time prior.

Glaser: And what does it do?

Heller: What does it do? I believe it is to, again, broaden our base of volunteers and to train volunteers so that they're available, not just for our Federation board and committees, but for our agencies. To broaden the base, that's our whole mission. The only way that we're going to grow as a community, grow in our campaign, is if we get more and more people involved. With so many people opting out of Jewishness and getting away from us, we have to develop new means of broadening the base, of getting more donors. We just can't rely on our old time donor base, and especially on major donors, because families are getting older and their children are not as involved. So there has to be new faces, and this is a way of getting new faces.

Board of Leadership Institute

Glaser: A year-round board of leadership institute was proposed. Did that come about?

Heller: A board of leadership institute has come about. Its purpose has been to tie in with synagogues and not our traditional supporters that we had in years before, again trying to broaden the base. It's another way of getting more people involved, of getting our story out before more people, and trying to get people involved in our organization than maybe just involved with their synagogues, or whatever.

Glaser: And has it been successful?

Heller: It's in its infancy, but the meetings were well-attended. I hope it will continue.

Glaser: Can you tell me about the Foundation Advisory Council?

Heller: No. [laughs] It doesn't ring a bell with me. Maybe it was handled by Phyllis Cook through the endowment department and I wasn't involved in it.

Teen Task Force

Glaser: Well, another project was the teen task force, programs and services for teenagers.

Heller: Yes. Our experience has shown that after bar or bat mitzvah and after the Israel trip we tend to lose our teenagers. So, here again, we're trying to make the tent big enough, so to speak, to bring all these people under it. This program is designed, and I know is being carried out, to not lose our teenagers and to develop programs for them. We're seeing this more and more in that families are bringing their teenagers to certain programs and events that we have.

Glaser: Was that your idea?

Heller: No. I cannot take credit for it, other lay people and staff have worked on this. As I say, the Federation has been thought of, and probably still is today, as not being an inclusive organization. We are thought of as an elitist group, and nothing could be further from the truth. So we have to do our best to dispel all these myths.

Organization Review

Glaser: There was an organizational review that was approved by the executive committee in March of '96. What new directions were needed for the future that came out of that? What changes needed for strengthening the Federation?

Heller: The organizational review?

Glaser: Yes.

Heller: I think it was some realignment of some staff positions. I think that's what that was referring to. I know we (not we but Wayne basically, and I okayed it) wanted to do some realignment of some staff and bring in some other people. Again, make some changes to make the Federation more "with it" for the nineties, and I think he has reorganized some of the staffing in the various departments of the Federation. We have a new campaign person that's come on board.

As hard as it is to get volunteers involved, the Federation movement seems to not have the superfluity of employees available. In fact, I've just noted that there are a tremendous number of federations looking for a tremendous number of employees in various key positions. So there are not a lot of people out there wanting to get into the Federation business at staff levels.

Glaser: Well, you know, several years ago there was an article in the Bulletin--I'm not sure whether it came out of a local situation--about how federation employees are not given the status and respect that is needed.

Heller: I believe that to be true. It must be true or else you wouldn't see all these federations looking for people to staff them. I hope that is not true with our Federation. I think that one of the things I am most proud about is the quality of the staff that I was privileged to work with. They are a dedicated group. I guess so often they are overlooked by lay people, but they shouldn't be because we couldn't exist without them. I mean, we come and go. You're a chairman or you're a head of a committee for a year or two at most, but hopefully the staff people will be there for a long, long time.

Coping with Less Funds

Glaser: What was the impact on the Federation during your presidency when funds were cut back, both from United Way and from the federal government?

Heller: When our campaigns don't have increases as well, it leads to a great deal of anxiety by the agencies. Under my presidency, the emigrés occupied a great portion of our time because San Francisco welcomed--still does. We get more than our share of emigrés, maybe Russian largely, and we have limited funds with which to do the programs for the emigrés. And we had special campaigns which were winding down that raised funds for emigrés. This was one of the major problems of my presidency: how do you keep the emigré programs afloat and at the same time give money to the other agencies that need money as well--

Glaser: And how did the Federation meet that?

Heller: How did they meet it?

Glaser: Right.

Heller: Well, we didn't always meet it according to the amount of money that the emigré agencies wished, and this caused some meetings where there was some anxiety. Some letters were sent out that agencies initiated that accused the Federation of not being aware of all the needs of the emigrés. But we have tried our best with the limited funds to continue the programs that we thought were the most necessary, and are continuing today.

Glaser: Actually, I meant in general. Not just the agencies that deal with the emigrés, but in general how did the Federation and the agencies deal with the cut-back in funds that occurred?

Heller: Well, we asked them to budget at 90 and 95 percent of their last year's budget. We asked them to list, in a priority way, what programs they could possibly cut back. We did successfully do some supplementary fundraising specifically for certain programs. So, we tried to do the best we could with the limited amount of dollars that we knew would be available.

Glaser: You had a special fundraising campaign called, "New Life for Emigrés."

Heller: Right. We had New Life for Emigrés, which we went to specific donors and tried to raise dollars. Some people, we know, have a great feeling for the emigré population, have a great feeling

that we should definitely take care of emigrés. So we instituted this special campaign. But as the years go on, we have told all emigré agencies that they must develop emigré programs as part of their normal budgets because you can't keep raising money for special causes. I think we've done a good job. Through the good work of the Jewish Family and Children's Service, we probably have the top emigré program in the United States as far as our success in absorbing them into our community.

Glaser: You get funds for the emigré program from the Council of Jewish Federations?

Heller: Yes. There's a fair share program based on the number of emigrés that go to each community. I think we're second or third after New York in the numbers of emigrés, so other federations are sending in money into a pool which we get some of. Then we get grants from the government, which we are concerned about now: how long that's going to continue and in what amount. So this is a real problem. The priority-setting problem, again, will help this. It's now been instituted.

Glaser: Is it unusual for the Council of Jewish Federations to establish that kind of a fund where some federations are financially helping other federations?

Heller: Correct. Very unusual, and at the Council meetings I have been to not all federations are supportive. They are all having funding problems of their own, so they don't want to have funds directed away from them. But we've been successful in keeping this program going. It gets harder and harder each year to keep.

A Marketing Plan and Fundraising

Glaser: Would you talk about the fundraising marketing plan? I think this was started during your administration.

Heller: Okay. As I can recall, it was just a new way of marketing, a sales effort. That's marketing of sales; how do we broaden the base, increase our donors. We've been successful in my tenure (and it's continuing) having campaign increases. Although they're slight, our campaign has increased in the last few years, which is unusual compared with other communities that have either had flat campaigns or lower campaigns.

Where we've been most successful the last few years is increasing our number of donors. That bodes well for the future.

Even though they may start out being a hundred dollar or \$5 hundred donor, as time goes on we've learned from experience. It's much easier to get them to increase their gifts, rather than to find new donors. I think this looks good for the future of the Federation. I know the '97 campaign is off to a good start in the same direction.

Glaser: There was a new quarter century circle that was established, and there was a very successful dinner given for the people who had been contributing--

Heller: Right. That took place, unfortunately, after my term was over, but it was well-planned during my term. It was a highlight in that never have sixteen hundred plus people come to a Jewish event in the Bay Area, and it was a wonderful evening for families and for donors of any size. In other words, a hundred thousand dollar donor who'd only given for one year sat in the back of the room, whereas a twenty-five dollar donor for fifty years sat in the front of the room. This was accepted and a wonderful evening. The numbers of staff and lay people that worked on this event was tremendous. From the moment you walked into the Hilton Hotel, you were greeted by someone who directed you, who told you what to do, and how to do it. And that came off without a hitch, which was amazing.

Glaser: Whose idea was it?

Heller: It had been done in other cities and so we got the idea; it had been done very successfully in Chicago. But no other city, based on the number of Jews, had had the numbers attending that we had. I've got to believe that people will come out for a free dinner for anything, because they didn't pay for a thing here. It was one of the first times that we picked up the tab for cocktails and the dinner. I hope it's done again before twenty-five more years go by.

Glaser: Do you expect that there will be future changes in fundraising?

Heller: Oh, absolutely. There has to be. We're going out now looking for multi-year gifts so that we don't come back to the same person year after year. If we can maybe get a three-year gift with an increase of some percentage, then we don't have to solicit them every twelve months; because it seems like you come around much faster than twelve months. So we're experimenting with multi-year funding.

Glaser: Would that be for a certain level of giver?

Heller: Oh, yes, for a major giver. Right. For capital needs, we're looking for multi-year gifts. I know all this will change as we learn from our experiences. The whole way is changing of raising money. I know on the endowment side it's very important that we're trying to get gifts endowed so that before major givers pass on they will have established a fund so that some part of their annual gift is continued. These are all, I believe, innovative ways of fundraising that weren't done ten or twenty years ago.

Closing Sonoma Office

Glaser: A part of the retrenchment affected the relationship with Sonoma County. You had to close the Sonoma office. What has been the effect of closing the office?

Heller: Well, as we speak, it's probably going to be reopened on a different basis. The last board meeting of the Federation, and again, through the good offices of the endowment side of the house, there is some money being allocated to tie in with the people of Sonoma. They have started their own Sonoma Council up there, not connected to the Federation. But they wish to have a Jewish presence, and so we're looking at ways of tying in with this presence and establishing, maybe not an official office, but some way of continuing what we started in the Sonoma County area but through a different means.

Glaser: It sounds as if it's something that should be encouraged when we talk so much about the falling away of Jews from the community.

Heller: Sonoma's an area that people are moving to. More and more Bay Area people have summer homes and weekend homes up there. So we know we need a presence there. We've learned how long it takes from our South Peninsula and Marin offices, that you've got to start slowly. The reason we closed it is that it wasn't functioning as well as the Federation would have liked. So maybe now, reconstituting it, opening on a different basis, it will be the to go.

Jewish Community Bulletin

Glaser: Will you comment on the relationship between the Federation and the Jewish Bulletin? There was a proposal that--.

Heller: Yes. There was a proposal to possibly sell the Bulletin or merge it. The Bulletin wants to become an independent organization and I believe in the long run this will be good for the community. We have looked at various ways of possibly tying it in with a Jewish newspaper company that does what the Bulletin does in five or six communities throughout the United States. We looked at that. But the Bulletin board decided they would rather stay independent and is looking at ways of becoming a for-subscription paper rather than largely a give-away. Although it's not a give-away, because part of your donation goes towards the Bulletin, but to become an independent agency.

Glaser: I thought it was an independent agency, only it had a subvention from the Federation.

Heller: Well, okay, it is; but it wants to work itself out of getting a subvention from the Federation. So it's been proposed that the Federation's subvention be decreased over a number of years. Then it eventually will be a subscription paper, a paid-for paper.

Glaser: Do you think it will succeed on that basis?

Heller: I don't know. They're going to experiment, I think, in '97, with going out on a subscription basis. But they realize it's going to take two or three years, so I don't know.

Glaser: It's hard to wean people away from something which is given freely.

Heller: Right. They have a number of subscriptions, now, and I guess we're hopeful that people will see the worth of the paper and subscribe to it. But we're very concerned. The Bulletin was concerned, as were members of the Federation executive committee, and still are, that for the smaller donor this is their only contact with the Federation and Jewish news. A twenty-five dollar donor is not going to make a thirty-eight dollar annual subscription.

Community Centers##

Glaser: It seems to me that you had a much bigger problem with the status of the San Francisco Jewish Community Center.

Heller: That was a real problem we had. They were in financial difficulty as far as membership was concerned. The building, as

you know, is sixty years old and suffered earthquake damage. The whole center movement, and the idea of an urban Jewish community center has changed so much. We learned this on our trip to New York, especially when we visited a couple of Jewish community centers. The role of the Jewish community center in the future is not clear, especially in San Francisco. Our outlying centers have done so well, but the urban center has not. So that's one of the still unknowns, the viability of 3200 California Street and the San Francisco Jewish Community Center--

One of my proudest moments, in that I acted not through a committee process, but Wayne and I decided that we had to act quickly and we closed the United Jewish Community Center, which was the umbrella arm of all the Jewish community centers in our Federation area. Having a central United Jewish Community Center was not working. It made the individual centers, and especially their boards, feel that they were not needed. Everything had to filter through the central office, so to speak. I think we did the right thing. It was done quickly and without a lot of the approval process, but it was being such a fiscal drain that I think in the long run it will be proven that it was a smart move.

Glaser: Was that just another layer of bureaucracy?

Heller: That's a good way of putting it, yes. I probably should have done more homework before we acted so quickly as to why it was set up this way, but it wasn't working. I think that's been proven that the centers are now, other than San Francisco, fiscally sound, and their membership is increasing. San Francisco, hopefully, will work itself out of the problems that this United Jewish Center has created and have its own game plan and will come out healthy in the long run.

Glaser: What are you going to do about the fact that the physical structure is in such poor condition and the building is so old?

Heller: Okay. That's the main concern--do we tear down? The Federation, during my presidency, looked at plans to tear down and rebuild. As everyone knows, it's so costly today. They had somewhat of a grandiose plan, which, fortunately, we did not approve. And now with the advent of the Jewish Museum becoming more of a cultural center, I think the role of a Jewish community center will be strictly as a community center. At one time it was thought to be a cultural center as well. Well, we certainly can't afford two Jewish cultural centers in the city of San Francisco. I believe that the cultural center is better being downtown, where the museum will be located in the Yerba Buena area, and the Jewish Community Center, at the 3200 California Street site, being a community center--

Glaser: I didn't realize that it was considered a cultural center. I knew it was considered a social center, especially for the emigrés.

Heller: Right. In the original plans, it was patterned to be more like the Jewish Center in New York, which is famous. It has cultural events and everything. I think those, in our city, are better served downtown. So, it will still have programs for youth and emigré and other purposes, but the art works and so on like that are better served at the Jewish Museum site.

Glaser: I never thought of the YMHA in New York as a community center.

Heller: You're right. Everybody wants to have a Jewish center like the one in New York City. They all want that. I believe it has sleeping accommodations and everything. We can't pattern ourselves after that. I'm hopeful, and I'm a big advocate of the Jewish Center at 3200 California Street. San Francisco does need a Jewish center; and I think that a scaled-down center will come out as being the proper thing to have there.

Glaser: What is the current status? I read that Diane Feinstein's daughter is taking over.

Heller: She's come on staff, and she's working on the education arm, on the early childhood programs, and so on. So the staff has changed out there, but they're still fighting an uphill fiscal battle. I think the key question at the moment is how much money is the Jewish Community Federation willing to put annually towards that center. They'll have to live within their budget because they have to have a balanced budget, and that hasn't come to pass as yet.

Support for Merger of United Jewish Appeal and Council of Jewish Federations

Glaser: What was your reaction to the proposed merger of the United Jewish Appeal and the Council of Jewish Federations?

Heller: I'm very disappointed that it didn't come to pass as we all thought it would by this time, the end of 1997. I attended a number of Council of Jewish Federation meetings, and San Francisco was one of the major supporters for the merger. Both Wayne and I spoke up at meetings for this, and we had our board's blessing. San Francisco, as always, was behind this movement and thought there was a great deal of waste and cooperation lacking

between the two organizations. I thought with Brian Lurie's retirement there was an ideal time to wed the two organizations. They were practically there until a few months ago, when apparently something came up and the two organizations decided not to proceed at the moment. Having said that, I see it's back on the table again, and I hope that will come to pass quickly now.

Board Retreats

Glaser: Did you have two retreats during your presidency? One for each of the years of your presidency?

Heller: No. We had a one day retreat at the beginning of my start of my presidency. Subsequently, this past summer just after my presidency, we had a two-day retreat, which was called the Future Search Conference. That was in July of 1996.

Glaser: Future Search?

Heller: Future Search Conference. What came out of that were changes. The benefit of that conference was that the Federation included both donors and some non-donors and some non-Federation people. Everybody had time to express their views. Many of the views at that conference are being developed today. There's going to be a follow-up, I know, in the next few months with the people who attended that conference to decide what steps should be implemented further. So that's on the drawing board. That was under Alan Rothenberg's domain.

Glaser: That was sort of the bookends to your administration.

Heller: Right. Alan Rothenberg is following up on lots of ideas and programs that had their infancy during my presidency. It's gratifying to know that eventually these things will come to pass.

Amuta and Israel

Glaser: In one of the board minutes when you were president, you mention that you consider the visit by the Amuta a highlight of your presidency.

Heller: Yes.

Glaser: Why was that?

Heller: I guess I get emotional when I go to Israel, and the Amuta and the things we've done in Israel are programs that we have started directly. In its baptismal age, it was called Project Renewal, headed by Annette Dobbs. I was privileged to be on one of the early Project Renewal committees and went to Israel. San Francisco was on its own. Instead of funding money through the UJA, we took some money, I believe it was a hundred thousand dollars, for which we were criticized way back in whenever it started, seventies or eighties', and directed that money specifically through Project Renewal to projects in Israel. We adopted the community of Kiryat Shmona² as our place where we were going to put our money to use.

Since then, on each of my visits to Israel, it's been an emotional experience to see what they have done with our funds. I have always used the expression that when you can touch and feel your dollars, it's much more meaningful than having it filtered through the UJA, although I know it does good work. But then San Francisco can actually be a part of something. The Amuta was a development from Project Renewal in that here are Israelis that are our counterparts in Israel that watch over our specific projects. It was one of the first times, I believe maybe the first time, that we brought at Federation expense three or four members of the Amuta to San Francisco. Since then they have now come on an annual basis. In fact they were just here for our Super Sunday and made calls, and were there as resource people. But to have them come to the board meeting was a highlight, I felt.

Glaser: So, how many times have you been to Israel?

Heller: Well, not as many as Annette Dobbs.

Glaser: Very few people have. [laughter]

Heller: She will always get the award for the most number of trips, and I'm sure Cissie Swig is a close second. I forget, over a dozen times, and I still enjoy going. One of my failures has been that I always felt I could get people to go on a mission to Israel,

¹In 1986, the Federation's overseas committee allocated \$100 thousand for independent projects in Israel.

²Kiryat Shmona was adopted as a Project Renewal town in 1982.

but it gets tougher and tougher. I wish there was some way that we could get people who haven't been to go, even if it's for two or three days, because that's all it takes. It's a wonderful way to get people involved. There's so much good that's being done over there. I believe I stated earlier in the interview process, if it weren't for a left turn or a right turn, we might be talking in Israel today.

Glaser: What is your feeling about the whole business of "who is a Jew" that seems to be reviving?

Heller: I guess we all have our views of Israel, and "who is a Jew" is no different than some of the changes the new Netanyahu government has brought in. I can't say that I'm in favor of that, but I just hope that it doesn't hurt our fundraising efforts. I'm concerned that more and more people are going to ask questions about Israel, about "who is a Jew," about the resettlements, all these things. I don't think we can change the government of Israel and how they wish to operate. I don't think that's what we're here for; but I wish they would be more encompassing, more inclusive, and I hope the "who is a Jew" problem goes away as it did once before. I can't believe that the Orthodox are going to make it difficult, but maybe they are.

It's politics, and I think we should stay out of the Israeli politics. I'd rather talk about whether to be involved in programs over there than the political side. I think the "who is a Jew" question is political, but I'm concerned because it takes away from the good work we're all trying to do and to help our Israeli brother.

Glaser: It seems to me there's a little bit of a conflict here in that you mentioned the importance of going there and hands-on and seeing what's being done. Yet that doesn't really tie in with your very strong feeling about being opposed to designated giving, because that's a form of designated giving.

Heller: It's a form, but it's money that we normally would give to Israel anyway through the UJA. So I don't see it--we don't designate a program per se. We have a committee that does that, so it's like our overseas committee in conjunction with the Amuta operates like a planning and allocations committee. That hundred thousand, which is now more than a hundred thousand, was not designated for a specific program. It was designated maybe for a specific community like Kiryat Shmona, but not a program. I don't view it as a designated gift, although, technically, I guess it is.

Glaser: That sounds like rationalization.

Heller: Okay, okay. Maybe, but at least the Federation took it away from the overall UJA dollars. So it's like a designation within the UJA. I guess I can't argue with that; but we felt that UJA was not--. We felt it would enhance our fundraising in that it was the beginning of designated giving. Okay, you're convincing me. I guess it was the beginning of designated giving but I think that's what people want. Again, I relate to the touch and feel as a way of raising money. It's better.

Glaser: Well, I'm sure that's true.

Heller: I mean, it gives people something to grasp, and I think that's important.

D'var Torah at Board Meetings

Glaser: You said to me that you're not a religious Jew.

Heller: Correct.

Glaser: And yet you gave a very effective d'var torah during your presidency that was based on the holiday of Shavuot.

Heller: Well, Nehama Tamler helped me a great deal. She was my d'var torah teacher. She prepared me for my five minutes of d'var torah. That was something that instituted, or was asked to institute at board meetings. It was being done at some of our agencies, and I felt that if it was being done at our agencies then it should be done at the Federation. So, it was an innovative process that has continued, although some of the d'var torahs are too long and take up too much of the meeting time. But at least my personal one was very brief. It was something that I felt that I should do once.

Glaser: How knowledgeable are you about Judaism?

Heller: Not knowledgeable at all.

Glaser: How important is it to you that you're Jewish?

Heller: It's very important that I be Jewish. I'm proud to say, whenever I'm asked, that I'm a Jew. The religious part of it is something that I'm not well educated on at all, but I feel that I can be Jewish in my way and not in the religious way.

Reflections on Being President

Glaser: Did you enjoy being president?

Heller: At times, yes. Although I think in all honesty they were brief times. I compare it to the presidency of the Jewish Home. I have to say I enjoyed the Jewish Home presidency more. Maybe because you're closer relating to people, whereas president of the Federation is a highly political position. Politics plays a difficult role, and I'm not a political animal. But there were times when I was very pleased with the job and the job I did do.

I guess some of the most gratifying aspects of the two years were bringing in some people to the committees and the board that had not been brought in before, broadening the base of the board just like we're trying to broaden the base of our donors. Some new people by name: Ron Warnick, Robert Levison, and especially a gentleman by the name of Alvin Baum--who I think were or are already future leaders who had not been sought out by the Federation.

I re-instituted officer meetings, which I felt were very important. When you have a forty or fifty person board and an executive committee that is sixteen or twenty people, I think you need a smaller group to discuss problems--amongst four or five, which is the number of officers. I felt those were very important to do, and that I see is continuing.

We're reaching parts of the community we didn't reach before, especially through Al Baum. We are now part of the gay and lesbian community, which the Federation has always wanted to be part of. And I think as the years pass now, we'll have a bigger impact with the gay and lesbian community, which in San Francisco as we all know is a major part of our community.

So, these are the things that I'm proud of. One other item that I'm proud of is the change of the way the annual meeting is run. I personally hate long lunch or dinner meetings, and it was a tradition that I hope I have stopped forever, maybe not. The annual meeting is now a cocktail affair in that first we have a 4:30 meeting that takes some sixty to ninety minutes, and then we have a sixty or ninety minute cocktail hour. I always felt that at sit-down lunches or dinners all you can talk to are the people at your table. The dinners were horribly long and dragged out, and here people have an annual meeting and then a social hour and a half, which I think is very important and has been proven to be very successful.

Glaser: At the conclusion of your presidency, did you have a feeling of let-down? I know that some of the presidents do. They've been in a position of power and now they're a bystander.

Heller: Yes. In one day you go, I guess, from the White House to the outhouse. [laughter] I really feel let-down in that our insurance office in the next few months is moving one block from the Federation, and for two years I had to walk fifteen or twenty minutes to the Federation. So my timing on that part is bad. But, yes, there is a great feeling of let-down from a job that actually (I think most past presidents would agree) is a job of what you make of it, but I felt it was really a half-time job. From a half-time job, one day you have no job anymore.

You know, two years is enough. I'm not advocating that the term should be any longer because I think change is good, and I'm sure my board and people were tired of hearing me for two years. I'm for the change. But, yes, there is a feeling of let-down. No question about it. Still, for the next two years after you're done you're part of the executive committee, and so on, so you are a part. I think all past presidents miss the job, so to speak, but it's nice that the past presidents do meet once or twice a year. I think the current president, and I know I did, whenever there's a major topic or a major change, we meet with the past presidents to get their blessing and their input. They come to meetings. It's a terrific organization to be an alumni of, the past presidents of the Jewish Federation.

[Interview 3: January 6, 1997]##

Glaser: After we stopped taping our previous interview, you pointed out to me the print on your wall with a form of a man who is wearing a tallis [prayer shawl] and is beating his breast. You said that Alan Rothenberg had given that to you. What does that say about your presidency or your reaction to your presidency?

Heller: I'm not sure what it says. [laughter] I can't remember what he said why he thought it was apropos. My guess is because I took the job quite seriously and worried about it and was concerned and tried to run things as expeditiously as possible. And maybe a number of times I had the train moving a little too fast in trying to get things done. But I see now that he's doing the exact same thing during the meetings I go to when he's in charge. So maybe some of it has rubbed off on him. That's why I think I told you that I'd like to give it back to him, framed, at the end of his tenure.

Glaser: Does this also suggest that there were frustrations involved?

Heller: Absolutely. Many frustrations. As maybe I said earlier, I wear my feelings on my face, and people can quickly tell when I'm frustrated or upset or pleased. So it works both ways.

Glaser: What were some of the frustrations?

Heller: Just not getting things done in as quickly or in as timely a manner as I would have liked. But I see, when there's a committee process it takes a longer time than I'm used to. I guess being in the insurance business either you make the sale or you don't; and in Jewish life it's not a question of making the sale all the time. It's a question of moving along the right road, and eventually you'll get to the end of the tunnel.

Glaser: Was there also the feeling that you had to be bringing these people along with you, almost pulling?

Heller: Correct, yes. There's the consensus gathering process, which I guess I wasn't prepared for, and I'm still not used to doing all the time instead of just bull-heading ahead.

Glaser: But given your earlier board membership, you should have been aware of that.

Heller: Somewhat, but at the Jewish Home there's a twenty person board and at the Federation there's a forty or fifty person board, so more consensus building is necessary. It just was somewhat more political: one organization versus the other. I wasn't quite used to that.

XI FEDERATION'S ROLE

Fulfilling Community's Needs

Glaser: Do you feel that the Federation fully meets the concerns and needs of the Jewish community?

Heller: Well, I guess you can never say fully, but I think more and more we're trying to become more aware of all the concerns. Naturally, there's never enough money to make everybody happy, so you have to do the priority-setting process, which the Federation is finally embarking on. I applauded the board at the last meeting for taking a big step, even though the present board doesn't think of it as a big step. I think the old-timers felt, and I truly believe, it is a big step and something that is necessary to try and do just what you've asked: trying to be all-inclusive and covering the whole community.

Glaser: Did you set forth a manner in which they should do this?

Heller: Yes. Through the planning and allocation process, we are now establishing a real process of priority-setting, which hopefully would be in place during 1997 and for the years to come.

Encouraging Involvement

Glaser: Oh, yes, you had mentioned that earlier. Did you, personally, do anything to encourage newcomers in the community to be part of the Federation?

Heller: Whenever possible I tried, as we talked about earlier, to bring new people into the Federation family to try. And I know Don Seiler, a past president, was in charge of finding new gifts and

so on. I think that will be continuing because we have to broaden our base. That's the only way we can grow our campaign and through that grow the participation of individuals to become active in the Federation.

Glaser: But when you speak of new gifts, doesn't that mean large gifts?

Heller: No, not necessarily at all. In fact, the figures show that in the last few years our campaign has grown dramatically in the number of givers, and they're all primarily at the bottom levels of the campaign. We hope to get people started giving, and eventually as their economic situation improves hopefully their gift will go up as well. So it's the numbers we feel are important--as important as the continuing major gifts. We need those too, but getting new people involved is the name of the game at the moment.

Glaser: If you'd had another term as president--.

Heller: No! Never! [laughter] One term is plenty.

Glaser: But would you have made any further changes in a second term?

Heller: Not further changes. I would have, again, tried to bring in new people. But I see that Alan Rothenberg has brought in several new people that he is friendly with. So that's all for the good. The beauty of changing presidents every two years is that there are new voices, new feelings, and new people who become involved. It's still a people business, so, naturally, we go where our friends are, or acquaintances, and we all have ideas of people we would like to get involved, and Alan is doing that as well as I did.

Glaser: Isn't there a sort of re-inventing the wheel, if after two years you have a new president and, in part, a new board?

Heller: True, but there are hold-overs. Just looking back at my officers, I kept a great nucleus of Cissy's officers. Alan kept a large nucleus of the officers I had. So you bring in one or two new people, and you have four or five hold-overs. I think that bodes well for the future.

Glaser: What are your hopes for the future for the Federation?

Heller: That it continues to thrive. That it doesn't get dismembered because of designated giving, which I think would tend to hurt the Federation. We need a centralized body, and the Federation fills that bill because so many organizations are not well-known, do not have their own public relations staff, and there is a

great need for the community federation. That's exactly the role that I hope our Federation plays.

Relationship to Greater Community

Glaser: Is there a relationship between the Federation and the greater community aside from the JCRC?

Heller: Well, the JCRC is an arm of the Federation--the way I look at it anyway--and that's our public relations arm. They are out there speaking for the organizations that don't have their own public relations staff a lot of times. So they serve a very necessary part of the Federation.

Glaser: But the relationship between the Federation and what used to be the Community Chest--now the Bay Area Crusade.

Heller: The Federation and the United Way relationship is not as close, naturally, as it once was. The funding problem of the United Way has greatly curtailed or eliminated many of the Jewish organizations from its fundraising arm. So the Jewish organizations are no longer receiving the sums of money--or in some cases zero money--from the United Way campaign. I know some Jewish organizations are still making requests to the United Way for funding, and that's a positive sign.

XII OTHER ACTIVITIES

Concordia Club

Glaser: I want to talk to you about your activities outside of the Federation. You're a past member of the board of directors of the Concordia Club?

Heller: Correct. I was on the board of the Concordia Club. I enjoyed that. I was on the board of Temple Emanu-El, Congregation Emanu-El, and enjoyed that. So I've tried all these organizations, I guess, or they have tried me; and I've learned something at each one of them.

Glaser: What do you think about the changes in the Concordia, for instance having a woman on the board?

Heller: I think that's terrific. I remember in the old days when I was on the board that was a major stumbling block. There were a great many old-time members and some new-time members that didn't want women part of the club. But the way I see clubs today, you have to have family memberships, and that certainly includes both sexes.

Glaser: They have also permitted the women to use the gym.

Heller: Absolutely.

Glaser: And there's a change in the fee structure?

Heller: Well, everything has changed, and god bless people like Claude Rosenberg, a great civic-minded person and a great benefactor of the Federation as well, who came forward when they were lacking in leadership and has taken charge as president of the Concordia Club and has done so much good out there. Hopefully it will survive now. I'm sure it will. It's well on its way.

Congregation Emanu-El

Glaser: When you were on the temple board, what was going on? How far back was that?

Heller: I'm trying to think. It was some time ago. It was when Rabbi Kirschner was the senior rabbi. I think my term was up just prior to the allegations of sexual harassment that ended his tenure at Congregation Emanu-El. But we were involved in the refurbishment of the sanctuary, I believe that was the highlight, and starting a campaign to raise the funds to bring the sanctuary up to date with earthquake standards and so on, which was accomplished.

Glaser: Were there any personnel matters that you were involved in? For instance, hiring of an associate or assistant rabbis or any other personnel?

Heller: I can't remember if we had one new assistant rabbi during my time on the board, but I was not involved in the personnel. I served under Rhoda Goldman, who was the president at that time, and she ran wonderful board meetings. I learned a lot by working with her.

It seems like the best part of all these activities has been working with people on the various boards of directors and making friends and seeing how other people handle meetings. It's been a real learning experience for me, as well as developing many friendships through my Jewish activities. For that I always will be grateful.

Temple Beth Am

Glaser: Somewhere I came across that you were a board member for Temple Beth Am?

Heller: Yes. In its infancy I was on the board of--my god, you've found out everything about me. Soon after Beth Am started, I was on the board there. I watched them grow in their start. It was watching the temple grow from almost nothing.

Glaser: You've gone, then, from a very, very small congregation to an extremely large one. Was it harder to work for Temple Beth Am because of its needs were so much greater?

Heller: No. I don't think it was any harder. They had growing problems, just like Congregation Emanu-El has similar problems today-- trying to bring in members and reaching out to the community and the usual problems of every congregation or of every club or of every federation. They all seem to be similar. It's just enjoyable when you're part of a successful organization. All of these organizations that I've been exposed to, I think are darn well run, and do serve a purpose in our community.

Glaser: Were you on the board of Beth Am when Don Seiler was involved?

Heller: I think I was on the board. It seems I've followed Don Seiler, a very close friend for a number of years, and it's a pleasure because he always leaves major footprints that I can't fill. But he leaves everything in such good shape as an accountant by trade that it's easy to follow him. As I mentioned earlier, because he became president of the Federation, I got moved ahead a couple years to become president of the Home sooner than anticipated. I'll always cherish my friendship with him.

Menlo Circus Club

Glaser: Tell me about being past president of the Menlo Circus Club. That was 1978 to '79. I don't think of that as a particularly Jewish outfit.

Heller: You are absolutely correct. In fact, a relative of my father was Rosalie Walter, Mrs. Clarence Walter. Her husband founded the Circus Club and came up with the name because of horses showing in rings, so it was like a circus. At that time I think the founders of the Circus Club decided that they didn't want too many Jewish families, even though most of the founders were Jewish. So for a number of years there was, I guess, an unwritten lid, or whatever you want to call it, on the number of Jews that were members of the club. Fortunately, that is no longer true, but I guess I'd have to say that in the last thirty or forty years I was the first Jewish president of the club after the founders passed on. That was quite an honor.

Glaser: How did that come about?

Heller: I started on the board of directors and worked my way up the ladder to become president. I don't know, I wasn't elected by the membership. It was more a nominating process, and I served my time on the board, and I guess the board of directors and the nominating committee felt I could do a good job as president. I

felt I did. I went through all the changes: we lost a manager, we had to refurbish. It wasn't like that was an easy couple years. There were many changes going on. Again, you look back and think, "Well, I accomplished something." And that makes me happy.

Glaser: Are you a member of any professional organizations?

Heller: No. I've sort of stayed away from insurance organizations per se. I'm not a member of any professional organizations. I guess I'm just a member of all the professional Jewish organizations, for which the pay is huge. [laughter]

Glaser: Are there any organizations that we haven't covered that you're a member of?

Heller: I don't think so. I could be a permanent member of the 93 Coghlan Lane Home Organization. [laughter] I'm looking forward to spending more time at home and less away at evenings and meetings.

Glaser: Is there anything that we've not covered that you would like to add?

Heller: Gee, I don't think so, except to give my thanks to Robert M. Levison, Jr., for knowledge gained by being his business partner and close personal friend for almost forty years; to Wayne Feinstein, the Jewish Community Federation executive vice president, with whom I worked daily for two years; and to the Jewish Community Federation Endowment Fund; and Eleanor Glaser of The Bancroft Library, who asked the pertinent questions and listened to me babble about my history. What makes these endeavors so worthwhile are the friendships and close personal feelings that have evolved. It certainly is true that I received so much more than I gave.

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**DOUGLAS M. HELLER
CHRONOLOGY**

- 1950 Committee to study merger of the Jewish National Welfare Fund and the Federation of Jewish Charities.
- 1954 Special meeting to consider merger after almost three years of study and close to 100 people involved. Merger came about because of increased support of local agencies by the Jewish National Welfare Fund, which called for closer integration between fundraising and planning agencies.
- 1955 President Walter Heller states it is necessary to preserve Jewish National Welfare Fund's corporate status for time being because California corporations' code didn't provide for transfer of assets of non-profit corporations in event of merger.
- 1956 First official board meeting of new Jewish Welfare Federation.
- 1957 Merger now approved by Jewish National Welfare after state legislature enacted law protecting bequests and legacies. No longer need to maintain inactive corporation.
- 1958 Population study to be done by Dr. Fred Massarik
- 1959 Formation of new group, Organization of Young Leadership
In late 50s. Douglas Heller a Federation intern. At Jewish Home?
- 1960 1962 Walter D. Heller President. Completion of Massaryk population study. Study of Jewish Community Centers' needs results in merger of Centers into United Jewish Community Centers and decision to construct three new buildings.
Capital fund drive for Mount Zion Hospital, Pinecrest, Jewish Community Centers.
- 1962-1970 Douglas Heller on board of Jewish Home for the Aged.
Opening of Pinecrest, a group residence for aged on grounds of Jewish Home for the Aged.
Approve land for Peninsula Jewish Community Center.
Sanford Treguboff executive vice-president; Louis Weintraub executive director.
- 1963 Sylvan Lisberger president.
- 1964 Ben Swig president
Mr. Heller on public relations committee and campaign speakers' bureau (dates?)
- 1966 Sam Ladar president. Young Adults Division established, Irving Rabin chairman
Study by Federation of Jewish education.

1967 Robert Sinton president

Two-year demonstration program of extension of Family Service Agency to Peninsula

1968-72 Douglas Heller member Young Leadership Cabinet.

1969 John Steinhart president.

Committee established to study Jewish education. Its report recommended improved quality of teaching; increased staff of Bureau of Education, and services to be provided by Bureau.

UJA Study Mission to Israel

1970 Dougas Heller, member of Federation board, on budget committee.

Women's Division and Young Adults Division now ex officio members of Federation board.

Second Massarik population study.

Social planning and budget committees combined. It is to confer with Bureau of Jewish Education to establish policy for allocation of funds to Jewish day schools.

1971 Mel Swig President

Mr. Heller receives Lloyd W. Dinkelspiel Award. He is assistant treasurer, member of social planning and budget committee, and member of United Jewish Appeal young leadership cabinet.

Sit-in by thirty-five young students presenting demands based on claim of Federation's insufficient support of Jewish education. However, for 1971, Federation increased its allocation to Jewish day schools almost three fold.

1972 Mr. Heller treasurer, and vice-chairman of Advance Division for campaign. He goes on Prime Minister's Mission to Israel.

Federation is now committed to support of Jewish day schools (like federations nationally).

1973 Jesse Feldman president

Mr. Heller treasurer, chairman of finance and administration committee, on executive, fundraising, social planning and budgeting, and on day school committees.

Executive committee turns down Hebrew Academy request for inclusion in capital funds drive and for allocation for enlarging academy. It also wishes to become direct constituent agency rather than presenting its needs and programs through the Bureau of Jewish Education.

Lawsuit by Hebrew Academy charging Federation solicited gifts with predetermined intent not to make allocation to academy. Judge tells both sides to settle out of court to avoid publicity.

Hillel and Brandeis day schools merge.

Committee appointed to explore needs of Jewish poor.

- 1974 Mr. Heller treasurer and campaign vice-chairman for Marin and Peninsula.
 Capital funds drive of \$15,000,000. One-half for Mount Zion Hospital, one-half
 for UJCC, Bureau of Jewish Education, and the Home for Jewish Aged.
 Louis Weintraub executive vice-president, Brian Lurie executive director.
 Federation established office in Palo Alto.
- 1975 Frances Green president.
 Mr. Heller campaign chairman and on social planning and budget committee
 Louis Weintraub designated consultant; Brian Lurie named chief executive officer.
 Jewish Vocational and Career Counseling Service now a constituent agency.
 Settlement of Hebrew Academy law suit. Federation pays academy \$26,000 and it
 may reapply for Federation funds as an affiliate of the Bureau of Jewish Education.
 Jewish Defense League invades Federation offices complaining of method of
 electing Federation board members. They leave when police arrive.
 Federation commits to non-profit housing project for the poor well elderly on
 corner of Walnut and Sacramento streets.
- 1976 Jewish community Endowment Fund now a new standing committee, Marshall
 Kuhn director.
- 1977 Peter Haas president
- 1978 Executive committee recommends major reorganization of United Jewish Appeal
 governance; reorganization should have significant federation representation.
 Project Renewal accepted; Tel Hanan is Federation's project.
 Federation moves to 254 Sutter Street.
- 1979 Jerome Braun president
 Menorah Park, Federation's housing for well elderly completed.
 Hebrew Academy asks for emergency supplemental funds to meet deficit;
 Federation agrees to one-time grant of \$70,000 but asks for fiscal responsibility in its
 enrollment policy.
- 1981 Richard Goldman president
 Concept of confederation formally approved by East Bay and San Jose federations
 Decision to construct new headquarters building.
 San Francisco is one of first cities in country to have a special gifts department.
 Permission given to Hebrew Academy to start first phase of capital funds
 campaign.
- 1982 Name changed to Jewish Community Federation of San Francisco, the Peninsula
 and Marin County. Later in year name is change to include Sonoma County.
 Kiryat Shmona adopted as second Project Renewal community.
 Israel-Lebanon war. Prime Minister Begin is sent a letter expressing shock over
 Sabra-Shatilla massacre.

- Federation serves as the fiscal agent for the San Francisco Holocaust Memorial.
- 1983 William Lowenberg president
Mr. Heller treasurer
Project Renewal committee to study Jewish Agency and Federation's relationship to it.
Creation of overseas committee.
Federation received Shroder Award for confederation from Council of Jewish Federations at General Assembly in Atlanta.
Brian Lurie reports on UJA Young Leadership Conference in Israel; raised issue of Federation's concern over politicization of Jewish Agency. For first time, Israeli leadership acknowledged Israel needs Diaspora Jewry, not only for funds and political support but also to strengthen quality of Jewish life in Israel.
- 1984 Move to new headquarters building. Museum opens October 10.
Richard Goldman reports on overseas committee's trip to Israel, states that Federation is the first federation ever to make an in-depth study of the Jewish Agency.
Overseas committee recommends opening a San Francisco office in Jerusalem, cost not to exceed \$35,000 a year.
- Ron Kaufman, president
Overseas committee recommends study of system of dollar delivery to Jewish Agency and basic partnership agreement between United Israel Appeal, Karen Hayesod, and World Zionist Organization. In question is number of representatives each has on the assembly.
On August 16, delegation of national leaders visit with Federation officers and overseas committee to discuss committee's recommendations. Mrs. Swig emphasized San Francisco's efforts for positive change in relationship to Jewish Agency. The Federation was asked to wait until February before visiting other cities to present Federation's concerns. But Federation will have articles in the Jewish press on its position; will give interviews rather than waiting for distorted stories to appear.
Board approves demographic study of confederated area of Northern California.
- 1985 Many other national and international bodies are following San Francisco's lead in raising issues dealing with the Jewish Agency's governance and accountability.
San Francisco was first community to establish overseas committee, which is now supporting bylaws changes proposed by Council of Jewish Federations re United Israel Appeal: greater federation participation on UIA board, elimination of political designation of department heads--to be replaced by professionals.
Approval for United Jewish Community Centers to conduct fundraising campaign for Marin JCC for a multi-service center.
Endowment Fund grants \$1 million to Hebrew Academy for its capital project.
Bylaws revision adds Women's Division president to the executive committee.
Overseas committee recommends bylaws make this a standing committee.
Federation's Jewish Identity Task Force discusses issue of "Who Is A Jew" and some of the series issues polarizing the Jewish world.

1986 Mr. Heller on following committees: fundraising, investment, capital funds, (cash collections subcommittee), insurance subcommittee, and endowment fund

Laurence Myers president

Allocation of \$100,000 for independent projects in Israel out of overseas allocation for 1986. Amuta committee, headed by Avraham Infeld, will search out meritorious programs and supervise Federation's Jerusalem office.

New Jewish Community Information and Referral Service, which came out of Jewish Identity Task Force, funded by Endowment Fund.

Federation sponsors a Jewish service corps: fully-subsidized college students, ages 18-25, to work in Israel. The first time the American Jewish establishment has stood behind programs involving Diaspora youth service in Israel.

Homewood Terrace totally phased out.

1987 Bylaws revision of overseas committee: Project Renewal not under that committee.

1988 Executive committee reports Hebrew Academy's possible action against Federation regarding academy's lease.

New provision for a president-elect.

Group goes to Israel re removing "Law of Return" from Knesset agenda

Annette Dobbs president

Executive committee reports Hebrew Academy's possible action against Federation concerning academy's lease.

1989 Mr. Heller on capital funds committee (cash collections sub committee). implementation committee and endowment fund committee.

Strategic planning committee reports community development is as important a priority as raising money; also recommends continuation of regional councils.

Amuta will focus on ongoing programs on a regional level in Upper Galilee.

Federation agrees to join newly-formed Joint Budgeting Council.

Ad Hoc committee on "Who Is A Jew".

1990 Mr. Heller on capital funds and endowment fund committees

Over 400 people took part in two-year activity culminating in strategic plan.

Request for \$1.7 million from Endowment Fund for Operation Exodus, plus major donors asked for commitment. Amuta votes to focus its resources on absorption of Soviet olim.

Endowment Fund bridge loan of \$2.5 million to Marin Campus.

A new planning and allocation structure proposed by the implementation committee because many agencies request Federation's lead in central planning.

Don Seiler president.

Executive search committee formed.

Federation's Operation Exodus termed most successful in country.

General Assembly meeting in San Francisco chaired by Eleanor and Larry Myers.
Board votes to re-twin with Project Renewal town Nesher.

Young Leadership Council holds first meeting; it grew out of demographic study and strategic planning.

Trial year for planning and allocations committee.

1991 Mr. Heller on capital funds and endowment funds committees.

Postponement of governance model proposed by implementation committee's subcommittee on governance.

Mrs. and Mrs. Richard Swig co-chair Federation's Shalom '91 Mega Mission to Israel.

Creation of department of community development; its purpose to involve people in Jewish life and promote more Jewish activities and programs to attract people.

Operation Exodus II begins.

Wayne Feinstein is now executive vice-president.

Operation Solomon--rescue and resettlement of Ethiopian Jews

1992 Mr. Heller on Federation-agency task force, which will consider ways and means of strengthening community services.

Implementation committee discontinued because it accomplished so many of its original goals for carrying out Federation's strategic plan.

In place of postponed governance proposal, president-elect Swig announces she will initiate consent calendar containing committees' formal motions, mailed out before board meetings.

Federation presents to board a restructuring proposal to reduce administrative budget.

Community development made a standing committee, and an Ad Hoc committee to establish criteria for community development grants.

Mrs. Swig president.

Need to reduce \$1.5 million deficit in general operating funds, since 1991.

Task force on Jewish continuity suggests collaborative agency/synagogue projects, with consultation by Federation staff. Also, that Bureau of Jewish Education have leadership in creating regional high schools, promotion of family education, and making possible Israel trips for every child.

Discussion with KQED re insensitive programming.

Federation /UJCC task force to re-establish sound fiscal conditions.

Federation task force with rabbis.

Informal quarterly meetings between Federation and agency directors.

1993 Mr. Heller, Mrs. Swig, and others go to former Soviet Union, Tashkent and Samarkand, Uzbekistan.

Federation winner of Council of Jewish Federation's William J. Shroder Award for innovative approach for serving college youth, which was developed in its Israel Outreach Project.

Community Development Department launches a self-study process.
Special task force on Jewish continuity focused its efforts on strengthening
Federation/synagogue relationship.

1994 Douglas Heller appointed president-elect.

Jewish community infrastructure seriously underfunded. Ability to assist Israel is dependent upon ability to support local Jewish identity.

Have had two consecutive fiscal years of retrenchment, staff resources now very thin. Financial shortfall of \$600,000.

Douglas Heller president



APPOINTMENT OF STANDING COMMITTEESAPPENDIX B

Upon motion made and duly seconded, the Board of Directors approved the following appointments made by the President for membership on the following Federation Committees:

SOCIAL PLANNING COMMITTEECHAIRMAN: Mrs. William H. GreenVICE-CHAIRMAN: Reynold H. Col

James Abrahamson
 Mrs. John C. Altman
 Alan D. Becker
 John L. Blumlein
 Paul E. Boas
 Mrs. John Bransten
 Louis L. Brounstein
 Dr. Arthur Z. Cerf
 Stanley Claster
 Harry Cohn
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 Mrs. Harold S. Dobbs
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 David Epstein
 Stuart Erlanger
 Mrs. Jack S. Euphrat
 Mortimer Fleishhacker III
 Howard Fleishman
 George Frankenstein
 Darrell Friedman

Mrs. Stanley M. Friedman
 Mrs. Eugene L. Friend
 Mrs. Hugo Friend, Jr.
 Mrs. Theodore Geballe
 Daniel T. Goldberg
 Mrs. Richard N. Goldman
 James A. Goldsmith, Jr.
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 Morgan A. Gunst, Jr.
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 Lloyd R. Sankovit
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 Donald H. Seiler
 David A. Silver
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 Mrs. Robert E. S.
 Peter F. Sloss
 Dr. Bertram Sol
 Mrs. Elliot Stein
 Dr. Jerry Westin
 Larry Wolf
 Herbert Yanowitz
 Norman A. Zilber
 Dr. Harold S. Zil

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 Rabbi Joseph Asher
 Martin Aufhauser
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 Alan D. Becker
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 Richard Bernstein
 Richard C. Blum
 Morris D. Bobrow
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 Harold J. Kaufman
 Lee S. Krieger
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 Herman Landson
 Herbert A. Leland
 Ben K. Lefter
 Robert B. Levitas
 William L. Lowe

Stuart G. Moldav
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 Laurence E. Myer
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 Allan Orwitz
 Bernard Osher
 Dr. Milton J. Pe
 Henry Robinson
 Dr. Samuel I. Ro
 Kenneth Rosenber
 Herbert I. Ross
 William Rubin
 Mrs. Madeleine L.
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 Joseph Sloss, Jr.
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 Mrs. Goodwin Ste
 Paul Steiner
 Mrs. Richard L.
 Rabbi Jacob Tra
 Murray H. Warsh
 Henry B. Weil

Jewish Welfare Federation
220 Bush Street, Suite 645
San Francisco, California 94104

APPENDIX

1973 STANDING COMMITTEES

EXECUTIVE COMMITTEE

Melvin M. Swig, Chairman
Jerome I. Braun
Reynold H. Colvin
Jesse Feldman
Mrs. William H. Green
Walter A. Haas
Douglas M. Heller
Laurence E. Myers
Benjamin H. Swig

FINANCE AND ADMINISTRATIVE COMMITTEE

Douglas M. Heller, Chairman
Henry E. Berman, Vice Chairman
Lloyd W. Dinkelspiel, Jr.
Robert E. Sinton
John H. Steinhart
Melvin M. Swig

FINANCE AND ADMINISTRATIVE SUB-COMMITTEES

Sub-Committee on Investments

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Warren H. Berl
Jack S. Euphrat
Daniel E. Koshland
Robert E. Sinton
Carl W. Stern

Retirement Committee

Robert M. Levison, Chairman
Abraham Bernstein, M.D.
Paul Boas
Lewis B. Levin
Stuart Seller
Jerome I. Weinstein
Louis Weintrub, Secretary

FUND RAISING COMMITTEE

Mrs. William H. Green, Chairman
Lloyd Sankowich, Vice Chairman
Karl Bach
Henry E. Berman
Abraham Bernstein, M.D.
Jerome I. Braun
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Mrs. Morris Cullner
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Lloyd W. Dinkelspiel, Jr.
Richard S. Dinner
Mrs. Harold Dobbs
George Edelstein
Nathan Jay Friedman
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Peter E. Haas
Douglas M. Heller
Seymour Hyman

Harold J. Kaufman
Jesse Levin
William J. Lowenberg
Robert A. Lurie
Mervin G. Morris
Dr. Donald Newman
Claude Rosenberg, Jr.
Edward Schultz
Donald H. Seller
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Mrs. Richard Swig
Mrs. Robert Taubman
Mrs. Marilyn Warshawer
Melvin B. Wasserman
David Weiner
Bernard G. Werth
Arthur B. Zimmerman

PUBLIC RELATIONS COMMITTEE

15

80

Laurence E. Myers, Chairman
Richard Rosenberg, Vice Chairman
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Irwin Bear
Alan Becker
Ronald Berman
Mrs. David Z. Cook
M. Stephen Cook
James M. Friedman
George Gaber
Mrs. Herbert A. Ginsberg
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Sidney Epstein, DDS	Lloyd R. Sankowich
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Stuart Erlanger	Howard J. Schor
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George Frankenstein	Frank H. Sloss
Mrs. Stanley Friedman	Peter E. Sloss
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✓Douglas M. Heller
Donald H. Seiler

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MARIN COUNTY DIVISION - CHAIRMAN, DAVID E. FREEDHEIMNORTH PENINSULA DIVISION - CHAIRMAN, DR. DONALD NEWMANSOUTH PENINSULA DIVISION - CHAIRMAN, MYER SCHER

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DONNA SOLOMON

BUILDING SUBCOMMITTEE

Chairman: Michael Podell
 Vice Chairman Barbara Isackson
 Staff : Elle Hoffnagel

Members: Ron Kaufman
 William J. Lowenberg
 Donald Sweet

Ex-Officio Laurence Myers

BYLAWS COMMITTEE

Chairman: Samuel Ladar
 Vice Chairman: Jerome Braun
 Staff: Phyllis Cook

Members: William Coblenz
 Randy Dick
 Jesse Feldman
 Alvin Levitt
 Robert Sinton
 Sheldon Wolfe

CAPITAL FUNDS COMMITTEE

Chairman: Adele Corvin
 Vice Chairman: Alvin Levitt
 Staff: Phyllis Cook
 David Bubis
 Gene Kaufman

Members: James Abrahamson Ron Kaufman
 Frances Berger Harvey Koch
 Judith Chapman Dr. Donald Linker
 Helene Cohen Bernard Osher
 Kenneth Colvin Michael Podell
 Richard Dinner Robert Rubenstein
 Kate Feinstein George Saxe
 John Freidenrich Donald Seiler
 John Goldman Stuart Seiler
 Frances Green Peter Sloss
 Richard Green Donald Sweet
 Peter Haas Melvin Swig
 Ruthellen Harris Marilyn Taubman
 Douglas Heller Ronald Wornick
 Donald Kahn Harold Zlot
 Geoff Kalmanson Allan Kaplan, Intern
 Sonya Kaplan

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Chairman:	Dr. Donald Linker	
Vice Chairman:	Sonya Kaplan	
Staff:	Loren Basch	
 Members:	 Stuart Aronoff Ron Berman Dr. Jeffrey Carmel Judith Chapman Andrew Colvin Kenneth Colvin Randall Dick Annette Dobbs George Foos George Frankenstein Ruthellen Harris Jack Kadesh Susan Kolb Ron Kaufman Harvey Koch Arthkur Krulevitch	 Nadine Krulevitch Sandra Leib Laurence Myers Dr. Donald Newman Dr. Joel Renbaum Marc Rosenberg Dr. Andrew Rosenblatt Norman Rosenblatt Adriana Ryan Albert Schultz Donald Seiler Roselyne Swig Sanford Tandowsky Phyllis Wasserman Sheldon Wolfe Ronald Wornick Judy Zimmerman

INSURANCE SUBCOMMITTEE

Chairman:	Kenneth Colvin	
Vice Chairman:		
Staff:	Nancy Hair	
 Members:	 Stuart Aronoff Joanne Backman Harry Cohn Dan Golden Richard Green Ruthellen Harris Douglas Heller	 Peggy Nathan Michael Rubenstein James Sammet George Saxe Paul Steiner Melvin Wasserman Steve Zimmerman

Ex-Officio: Albert Schultz

INVESTMENT COMMITTEE

Chairman:	Claude Rosenberg	
Vice Chairman:	Toby Rosenblatt	
Staff:	Nancy Hair Phyllis Cook	
 Members:	 James Abrahamson Warren Berl Joseph Blumlein Jerome Debs Tully Friedman Daniel Golden Douglas Heller	 David Kavrell Peter Maier Maurice Mann William Rollnick Alan Rothenberg Robert Sinton Alan Stein

ENDOWMENT COMMITTEE

Chairman:	Rhoda Goldman	
Vice Chairmen:	Peter Haas*, Development Donald Seiler, Allocations	
Staff:	Phyllis Cook Deborah Bleicher	
Members:	James Abrahamson Rabbi M. Barenbaum John Blumlein Joseph Blumlein Harry Blumenthal Jerome Braun* Adele Corvin Ruth Debs Richard Dinner** Annette Dobbs** Jesse Feldman * Howard Friedman Hanna Fromm Frances Geballe** Richard Goldman* Frances Green* Morgan Gunst, Jr. Douglas Heller	Ron Kaufman* Samuel Ladar* Robert Levison Alvin Levitt William J. Lowenberg Phyllis Moldaw Raquel Newman Bernard Osher George Saxe Albert Schultz William Russell-Shapiro Robert Sinton* John Steinhart* Melvin Swig L. Jay Tenenbaum Haskell Titchell

Ex-Officio: Laurence Myers
 Claude Rosenberg

Intern: Don Abramson

*Federation Past Presidents

**Reappointed for second three-year term.

EVA HELLER KOHN SUBCOMMITTEE

Chairman:	John Blumlein
Vice Chairman:	
Staff:	Deborah Bleicher
	Goldie Cutler, National Council of Jewish Women George Saxe Carolene Marks, Hadassah William Lowenberg
Ex-Officio:	Rhoda Goldman

Item 11:

ENDOWMENT COMMITTEE
(in formation as of 9/18/89)

NOTE: For this committee only, the following key applies:

+ Notes Federation Past Presidents

Chairman: Don Seiler

Vice Chairman: Melvin Swig+, Development
Peter Sloss, Allocations

Staff: Phyllis Cook
Dan Asher

Members:	James Abramson	Alvin Levitt
	Ben Baum	William Lowenberg +
	Rabbi M. Barenbaum	Bruce Mann
	Ernest Benesch	Phyllis Moldaw
	Harry Blumenthal	Laurence Myers +
	John Blumlein	Bernard Osher
	Joseph Blumlein	Eda Peil
	Jerome Braun +	William Rollnick
	Adele Corvin	George Saxe
	Jesse Feldman +	Jack Schafer
	Hanna Fromm	Albert Schultz
	Bud Gansel	William Russell-Shapiro
	Richard Goldman +	Geraldyn Sicular
	Frances Green +	Robert Sinton +
	Peter Haas +	John Steinhart +
	Douglas Heller	Melvin Swig +
	Geoffrey Kalmanson	L. Jay Tenenbaum
	Ron Kaufman +	Haskell Titchell
	Samuel Ladar +	Sidney Unobskey
	Robert Levison	Anita Weissberg

Ex-Officio: Stewart Foreman
Claude Rosenberg

Intern: Don Abramson

Item 4:

ENDOWMENT COMMITTEE
(in place as of 9/18/90)

Chair:	Mervin G. Morris	
Vice Chair:	Melvin M. Swig, Endowment Development Peter F. Sloss, Endowment Allocations	
Staff:	Phyllis Cook Peter Gertler	
Members:	Rabbi M. Barenbaum Benjamin Baum Ernest A. Benesch John Blumlein Jerome Braun Adele Corvin Annette Dobbs Jesse Feldman John Freidenrich Robert Friend Hanna Fromm Bud Gansel Richard Goldman Frances Green Peter Haas Douglas M. Heller Geoffrey Kalmanson Ron Kaufman Samuel Ladar Robert Levison Alvin T. Levitt William J. Lowenberg	Bruce Mann Phyllis Moldaw Laurence Myers Bernard Osher Eda Pell John Pritzker William Rollnick George Saxe Jack G. Schafer Albert L. Schultz William Russell-Shapiro Geraldyn Sicular Robert Sinton John Steinhart L. Jay Tenenbaum Haskell Titchell Bertram Tonkin Sidney Unobskey Anita Weissberg
Ex-Officio:	Claude Rosenberg, Chair, Investment Committee Andrew Rosenblatt, Chair, Planning & Allocations	
Intern:	Don Abramson	

Item 11:

EXECUTIVE SEARCH COMMITTEE
(in place as of 9/18/90)

Chairman: Donald Seiler

Members: Rabbi Michael Barenbaum
Annette Dobbs
Donald Friend
Richard Goldman
Peter Haas
Barbara Isackson
Joelle Steefel
Mel Swig
Roselyne Swig

Item 12:

IMPLEMENTATION SUBCOMMITTEE
(in place -- as of 9/18/90)

Chair: Annette Dobbs

Vice-Chair: Susan Folkman

Staff: Brian Lurie
Nina Bruder

Members:	Adele Corvin	Debra Pell
	Stewart Foreman	Alan Rosen
	John Friedenrich	Richard Rosenberg
	Bob Friend	Dr. Andrew Rosenblatt
	Sanford Gallanter	Rabbi Peter Rubinstein
	Douglas Heller	George Saxe
	Barbara Isackson	Albert L. Schultz
	Sonya Kaplan	Stuart Seiler
	Al Levitt	Joelle Spitzer-Steefel
	Bob Lipman	Donald Sweet
	Susan Lowenberg	Roselyne C. Swig
	Larry Myers	Ronald C. Wornick
	Sora Lei Newman	Dr. Harold Zlot

For Release : November 5 /71

Douglas M. Heller To Receive
Lloyd W. Dinkelspiel Young Leadership Award

Douglas M. Heller, Assistant Treasurer of the Jewish Welfare Federation of San Francisco, Marin County and the Peninsula, who will receive the Lloyd W. Dinkelspiel Memorial Award presented by the Federation's Board of Directors at its Annual Meeting on December 14, 1971, will also be honored at a special banquet for Young Leadership Award Winners to be held at the Council of Jewish Federations and Welfare Funds ^{Year} General Assembly in Pittsburgh, Pennsylvania November 10 through 14. The CJFWF recognition is extended to dedicated young men and women who have demonstrated their commitment to the Jewish community and their ability as leaders.

The Lloyd W. Dinkelspiel Memorial Award was established in 1950 by the Federation's Board to honor those with leadership potential and is named for the First President of the Jewish Welfare Federation. Douglas Heller has served the community with distinction for a number of years. Currently, in addition to his membership on the Board of Directors of the Federation, he is also Vice-Chairman of the Advance Division for the 1972 Campaign. He is a member of the Social Planning and Budget Committee of the Federation. He is also a member of the National United Jewish Appeal Young Leadership Cabinet.

In recent years, he has served on the Public Relations Committee and the Campaign Speakers' Bureau for the Federation. He has served as an officer and Director of the Jewish Home for the Aged and has participated

JCF chief to continue the legacy of his father

LARRY KANTER
and SUZAN BERNSTEIN
Special to the Bulletin

When Doug Heller sits down to chair board meetings at the Jewish Community Federation, he always pauses a moment when he sees the portraits of his predecessors hanging on the office wall.

"When you look at that wall, it's pretty impressive," says Heller, who recently succeeded Roselyne "Cissie" Swig as president of the S.F.-based federation.

"It makes you step back, and remember that you have a tradition to keep going. The past presidents of this organization leave a real legacy."

For Heller, that legacy is especially powerful. His father, Walter Heller, was the JCF's third president, serving a two-year term from 1960 to 1962 — and dad's photograph continues to stare down at the board room's long meeting table.

"The world has changed so much since his day in the federation," says Heller. "But they started something that we have to continue. They started a community."

And the world continues to change. Peace is breaking out in the Middle East; the mass exodus of Jews from the former Soviet Union has slowed down significantly; and the local Jewish community has placed increased emphasis on education and continuity.

According to Heller, the federation must adapt to those changes.

"Change frightens people," admits Heller, 63, a San Francisco native and insurance broker for 37 years. "But business is change, and we're a business — a big business."

"According to Webster's, 'change' means 'to alter, vary or modify.' I don't think that term should scare us."

Heller should provide a steady hand at guiding the JCF through the changes,



Photo — Val Fleish Communications

New JCF president Doug Heller, in front of federation building in San Francisco, hopes organization can change with the times.

according to those who have worked with him.

"I think Doug will be an excellent president," says Wayne Feinstein, executive vice-

president of the federation. "He is a dream in terms of volunteer-professional relationships. He's inclusive. He draws people in,

See NEW, Page 39



New JCF president Doug Heller (left) meets with Vadim, an Uzbek Jew, on a recent mission to the former Soviet republic Uzbekistan.

New JCF head: a team player

Continued from Page 1

he respects dissenting points of view, but is very good at working on issues until a consensus is reached. And that is exactly what a federation leader needs."

"He is a delight to work with," adds Jerry Levine, executive director of the Jewish Home for the Aged. "He has a knack for getting the best out of people, and he's always approachable. When he conducts business, he does it with a sense of humor."

Heller has been a familiar figure at the Jewish Home for more than a dozen years. As part of the JCF's leadership development program, he served as a federation intern on the home's board of directors. "I chose it because they had the best lunches," he jokes.

Heller then served as a regular board member for several terms, eventually assuming the presidency. A recent \$22 million capital campaign to build a new wing at the Silver Avenue facility took place under his administration.

According to Levine, much of the campaign's success is a result of Heller's leadership. "He understands the overall concept and benefit that comes from team play," Levine says.

With capital campaigns coming up for Jewish Community Centers in San Francisco and the North Peninsula, as well as for the Jewish Museum San Francisco, Heller hopes to build on the success he achieved at the Jewish Home.

He is convinced that the money is available to fund those projects and others. But he says it is imperative for community groups to work as a whole, not independently, if donors are to respond positively.

"I think our major donors are telling us that they have 'x' number of dollars that they can give at any one time. We have to give our donors breathing space. We have to organize and get all our agencies focused on the same page."

Heller also intends to revitalize the federation's mission programs to Israel — which he says can be extremely effective fund-raising tools. When he led the federation's annual campaign in the mid-1970s, for example, he raised in excess of \$7 million; he credits a "terrific mission" for doing so

well in what was a "non-crisis" year.

"Emergencies, rescue operations — they raise lots of dollars. But we don't have those today," he says. "That's one reason why we have to do some re-engineering."

The S.F.-based federation has at least one advantage over other federations coping with the same problem — the strong Amuta program, which directly funds projects in northern Israel, particularly in the border town of Kiryat Shmona.

"Any mission must spend time in Kiryat Shmona, which is our city," insists Heller, who has been to Israel 10 times since his first visit in 1967. "In Kiryat Shmona, you see our dollars at work — what they have done and what they continue to do. It's a great sell if we can get people there."

Heller hopes missions will play a significant role in the 1995 campaign, beginning in October with the

UJA president's mission for major donors. He also hopes to begin offering shorter missions to Washington, D.C., where participants will visit the U.S. Holocaust Museum and meet with Sens. Dianne Feinstein and Barbara Boxer, AIPAC officials, as well as with Cissie Swig, who recently moved to the capital to take an arts job with the Clinton administration.

Back in San Francisco, Heller hopes to increase senior housing and emigre services. He also wants to coordinate fund-raising among community groups as well as seek out new sources of funds.

It all adds up to a full plate for his two-year term, he admits.

Fortunately, his employer, Sedgwick James of California, has basically given Heller time off so he can direct his attention to the federation. "I told all my Jewish clients not to expect me to call on them," he jokes — adding seriously, "they gave me their blessing."

“
He is a delight
to work with
”

Larry Kanter is a staff writer for the Jewish Bulletin; Suzan Berns is a writer in the communications department at the JCF.

OPEN FORUM Doug Heller

A Full-Service Jewish Community

San Francisco Chronicle

FRIDAY, DECEMBER 9, 1994

AMERICANS ARE masters at focusing on the job still to be done; seldom do we emphasize our accomplishments. As a result, we inadvertently reinforce the image of a community that has somehow fallen short.

It's not hard to explain why we focus on need. A recent survey by the San Francisco Food Bank says that 90,000 San Franciscans are not getting enough to eat. We all know people who are unemployed or underemployed. Homelessness, AIDS, chemical dependency and violence are all critical problems in our society.

Our challenges will grow dramatically in the coming years, if as expected, the new Congress cuts aid for social programs and looks to charitable organizations, including the Jewish Community Federation, to pick up the increased burden.

Although there is much to be done, we should feel a sense of pride at what's been achieved so far. In the last year, for example, with \$17 million in support from the federation, dozens of local groups have effectively addressed compelling human needs and worked to enhance the quality of life for Jews and non-Jews alike.

More than 15 percent of the local Jewish population lives at or below the poverty line and a growing number of elderly Jews and families seek food for survival. Our agencies go to the front lines daily, providing nutritious meals to frail seniors and emergency food, housing and cash to those in need. Individual counseling, workshops and support groups also are available for people dealing with life's traumas.

Lack of jobs is the source of many problems and there are programs that offer retraining and assistance in work placement, particularly for people whose skills or age make them harder to employ. This program also serves a population of new Americans, refugees from the former Soviet Union numbering

25,000, who with help from our community have been reunited with family members here.

Public policy is a relevant part of every citizen's life. Education forums and advocacy on issues of social concern ranging from human rights to prayer in school, on a local, state and national level are important functions.

Nursery and preschools, and dynamic teen programs, in a warm, nurturing environment, can be found through our network of community centers.

For seniors, programs ranging from innovative activities for healthy elderly people to acute health-care programs for those who are ill place a premium on dignity and quality of life. And for young adults at area universities, there are religious, cultural and social events.

Apart from the human services, there is a bounty of cultural, educational and public-affairs activities — including film festivals, a speaker's series and two Jewish museums that attract world-class shows.

The main point is that we have developed something special — a full-service Jewish community that sometimes goes under-noticed even by its beneficiaries. A particular point of pride is that so many of the programs help Jews and non-Jews and bring together diverse communities.

We must protect these achievements. Super Sunday, the federation's annual fund-raising "phonathon," will be held Sunday. It is my hope that every community member will keep in mind the creativity, vibrancy and safety-set atmosphere of the Bay Area's Jewish community — and say so with a donation when a volunteer calls.

Doug Heller, a San Francisco native, is president of the Jewish Community Federation of San Francisco, the Peninsula, Marin and Sonoma counties.

Israel Connections

YOUR OVERSEAS DOLLARS AT WORK

Memories of a JCF Overseas Committee Trip to Israel

Landing in Ben Gurion Airport in Tel Aviv on the eve of Yom Hashoah, Holocaust Memorial Day, members of the Jewish Community Federation's Overseas Committee knew they were in for a meaningful trip.

While in Israel evaluating how the JCF's overseas dollars are being spent, participants also took the opportunity to engage in informative discussions regarding some of the crucial issues now facing Northern Israel. They met with such



Just one day before Hamas rockets fell in the town of Kiryat Shmona in the Northern Galilee, the Overseas Committee was in the area on a goodwill visit to Reja, a local Arab village. They were there to observe a 12-year-old project. The project, called "Kites for Peace," unites Arab and Jewish children by having them design and fly kites together. Currently, it is under consideration for funding by the JCF. Here, Annette Dobbs and Doug Heller are shown with an Arab girl, one of the project's participants. The children were allowed to design the kites as they wished and she chose to have hers resemble the Israeli flag.

The following week, while participating in the official opening ceremony of Yom Ha'atzmaut, Israel's 47 Independence Day celebration on top of Mt. Herzl, those feelings were confirmed.

Trip participants, a delegation of 23 committee members, had come to Israel for a first-hand view of the breadth of projects funded by the JCF — one of the first American federations with an office and staff in Israel.

officials as Kamal Mansour, Druze community advisor to the president on minority affairs, and Mayor Aharon Valenci of the Upper Galil Regional Council.

At the end of the 11 day trip, after meeting with officials, completing on-site visits to JCF-funded programs and talking with many of the people these programs serve, the Overseas Committee returned with a renewed commitment to furthering the JCF's innovative work in Israel. ■

The following Community members participated on the recent trip to Israel: Eve Bernstein, Neill Brownstein, Annette Dobbs, Emanuel Friedman, Doug Heller, Barbara Isackson, Al Levitt, Sora Les Newman, Bill Rosenfeld, Alan Rothenberg, Joelle Steefel, and Murry Waldman.

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SAN FRANCISCO, CA 94105

SPONSORED AND PREPARED BY THE JEWISH

24 JUNE 2, 1995 ■ JEWISH BULLETIN



Al Levitt (right) and Amuta member Yehiel Admoni attend a "LeHayim Reception" at the Child Development Center in Kiryat Shmona honoring the JCF for helping to fund a refurbishment project of this regional health center.



To gain an understanding of the economic status and changing role of the growing moshavim sector in the Upper Galil, Joelle Steefel (center) met with Amuta member Carlos Goldberg, who lives in the area.

COMMUNITY FEDERATION OF SAN FRANCISCO, THE PENINSULA, MARIN AND SONOMA COUNTIES

Jewish Community Federation of San Francisco, the Peninsula, Marin and Sonoma Counties
Department of Planning and Allocations

PLAN FOR THE PRIORITY SETTING PROCESS

December 14, 1995

Rationale for Priority Setting

Our Federation is continuously faced with the tremendous challenge of balancing needs against resources. This task, daunting under any circumstances, is made even more difficult in an environment of relatively flat annual campaign dollars, growing competition for philanthropic resources, ongoing resettlement obligations, special concerns about Jewish continuity, prospects of diminishing public funds, and the general concern about maintaining the core Jewish communal service network. The Board's mandate to establish priorities echoes efforts that have taken place in a number of other communities.

One definition of a priorities plan is a "method of systematizing value judgments and making them explicit in the expectation that the results will influence resource allocation decisions." It is worth emphasizing that while information is an important factor, the essence of a priorities plan is based upon values and judgments. The credibility of the process is at least as vital as the design.

In practice, establishing formal priorities by a federation is extremely difficult because of the multiplicity of constituencies and their competing needs and values and because of the federation's historic commitment to a broad and inclusive mandate. Nevertheless, it is very clear that priority setting, as part of community planning, is needed to maintain Federation's credibility with donors, its success in helping to build the community, and its ability to manage all its resources. This process must be responsive to emerging needs, produce results that are sound, and offer direction concerning which concerns ought to be addressed by the community and merit the allocation of human and financial resources. Priority setting involves the painful necessity of making choices and changes and is an ongoing process.

Overview of the Process

The purpose of this priority setting process is to develop a framework which insures that Jewish communal resources available to Federation are used to address the most important concerns facing the community, consistent with Federation's mission.

"Priority" means the relative position of one possible use of Federation's resources in the communal service delivery system compared with other possible uses of those resources, within some fixed time period. Included among the "resources" are funding from the annual campaign and endowments, the time and attention of lay leaders and professional

staff and the use of specialized expertise. The priorities that result from this process will be used to help determine a multi-year planning agenda, allocate funds, make available non-financial resources, mobilize support for the annual campaign, raise endowment funds, and provide reliable guidance to agencies.

This process will not review Federation's mission, organization and functions. It is not intended to address overseas concerns or priorities between local and overseas services.

The priority-setting process is expected to provide a framework that will assist Federation's allocations and grant-making processes that will take place during the spring of 1997. At the same time, this framework should be useful to position Federation to make the best possible use of increased resources that may be garnered. The results will be suitable for a relatively short period of time; every several years, the process should be partly or fully repeated. Ideally, the process should take place again in conjunction with a new demographic study of the Jewish population.

The challenge of this process is to design and implement a system that integrates and balances varying perspectives. Accordingly, input from various stakeholders will be sought, including community leaders and representatives of agencies and organizations. We will rely significantly on existing information and utilize existing volunteer structures for carrying out the process.

The priority setting process will be overseen by the Planning and Allocations Committee of the Jewish Community Federation.

There are three phases of the process: information gathering and analysis; priority-setting; and priority utilization.

Information Gathering and Analysis

1. Identify the broad goals of Jewish communal services

A list of broad goals will be developed which reflect the purposes of Jewish communal services. These goals should reflect services that the Jewish community now provides or might provide in the near future. The initial list of goals may be expanded as a result of information gathered during the rest of the process.

2. Identify the services that address those goals

Within each goal, specific services currently or potentially provided by the Jewish community will be identified and briefly described.

3. Identify significant unmet or undermet needs

Significant unmet needs related to each goal will be identified and discussed, as well as the implications for funding, planning, coordination, advocacy and other approaches.

4. Identify significant environmental variables

Recent developments in service delivery, funding trends, and demographic factors will be identified and discussed.

5. Identify the views of key stakeholders

Individual interviews and focus groups will take place with community leaders and representatives of agencies, organizations and synagogues in order to ascertain their perspectives on priorities.

6. Analyze the information gathered

All of the information gathered will be analyzed and discussed in terms of the implications for priority setting.

Priority setting

1. Determine criteria for ranking the goal statements

Criteria, which express values about relative importance, will be developed to facilitate the process of ranking the goal statements.

2. Rank the goal statements

The goal statements will be ranked in order of importance for Federation funding.

3. Determine critical unmet needs

Based upon the needs assessments, a list of critical unmet needs will be compiled.

4. Develop policies and strategies

Based upon the information gathered, the ranking of goal statements, and the needs assessments, policies and allocation strategies will be developed to address the following questions, among others that may arise during the process:

- ** What is the nature of Federation's continuing commitment to support for Jewish communal services?
- ** Which domestic service goals are considered most and least important to be funded by Federation?
- ** What are the most significant unmet or undermet local service needs and how should they be addressed? Which services should be expanded or contracted?
- ** What are the implications for planning and the allocation of human resources?
- ** What allocation strategies should be utilized?

Priority Utilization

1. Determine planning priorities

A first application of community priorities is in the development of a multi-year community planning agenda, which should identify changes in the attention devoted to specific issues and planning with regard to the development, expansion, reduction, consolidation, and location of services.

2. Determine priorities for allocations

Priorities do not translate automatically into dollars since decisions about allocations are based upon additional criteria such as cost-benefit, and impact. Alternative methods of utilizing priorities for allocations, in conjunction with other criteria, will need to be examined. The options include the following:

- *determining allocations on the basis of each agency's mix of services and their priority status;
- *determining allocations and grants for specific services, based upon priorities;
- *setting aside a portion of funds for development of expansion of high priority services;
- *using an allocations base that is lower than the prior year and funding supplemental requests in accordance with priorities.

3. Determine priorities for financial resource development

Specific high priority services and needs should be identified for funding from endowments and foundations, taking into account appropriateness for such funding and assessment of funding opportunities.

4. Determine priorities for non-financial assistance

Specific high priority services should be identified that would benefit from non-financial assistance such as technical or management assistance, program evaluation, or advocacy.

Timetable

November, 1995

1. The plan for the priority setting process and a list of goal statements will be prepared by a leadership group charged with designing the process.
2. A draft paper on environmental trends will be prepared.

December, 1995

1. The plan will be discussed with the overall Planning and Allocations Committee, Executive Committee and with the presidents and executives of local beneficiary agencies.
2. Existing information on services that relate to the goal statements will be compiled.

January - February, 1996

1. Agencies, organizations, and synagogues will be asked to contribute information for the needs assessments.
2. A Priority Setting Committee will be constituted.

March - April, 1996

1. The liaison teams of the planning and allocations subcommittees will meet to discuss and develop the needs assessments.

April - June, 1996

1. The opinions of community volunteer leaders and organizational representatives will be sought, individually and in focus groups.
2. Criteria will be developed to facilitate ranking the goal statements.

September - November, 1996

1. The Planning and Allocations Committee and its subcommittees will review the results of the needs assessments.
2. The Priority Setting Committee will:
 - a) review all the information gathered to-date.
 - b) develop criteria to facilitate ranking the goal statements.
 - c) develop recommendations for policies and allocations strategies relative to priorities for fund distribution, financial resource development and other uses.
3. The Planning and Allocations Committee will develop a multi-year planning agenda.

December, 1996

1. The ranking of goal statements and a report on policies and strategies will be presented to the Board of Directors for adoption.

Jewish Community Federation of San Francisco, the Peninsula, Marin and Sonoma Counties
Department of Planning and Allocations

Priority Setting Process

GOAL STATEMENTS FOR DOMESTIC JEWISH COMMUNAL SERVICES

December 14, 1995

(goals are not in priority order)

1. Jewish learning and experiences for children and their families

To instill Jewish knowledge, values, attitudes and practices among children and families through classroom study, non-formal Jewish experiences, and/or cultural programs.

day school education

synagogue school and other supplementary school education

Jewish identity-oriented camping and retreats

Jewish family education

Jewish socialization programs

2. Jewish learning and experiences for teenagers and their families

To instill Jewish knowledge, values, attitudes, and practices among teenagers through classroom study, non-formal Jewish experiences and/or cultural programs.

synagogue school and other supplementary school education

youth group and other Jewish socialization programs

Israel experiences

Jewish identity-oriented camping and retreats

community service programs

3. Jewish learning and experiences for college students

To instill Jewish knowledge, values, attitudes and practices among college students through classroom study, non-formal Jewish experiences, and/or cultural programs.

Jewish educational, spiritual and socialization programs

Israel experiences

community service programs

4. Jewish learning and experiences for young adults

To instill Jewish knowledge, values, attitudes and practices among young adults through classroom study, non-formal Jewish experiences, and/or cultural programs.

- Jewish educational, spiritual and socialization programs
- Israel experiences
- community service programs
- leadership development programs

5. Jewish learning and experiences for adults

To instill Jewish knowledge, values, attitudes and practices among adults through classroom study, non-formal Jewish experiences, and/or cultural programs.

- Jewish educational programs
- Jewish family education
- programs for interfaith families
- Israel experiences

6. Jewish culture

To promote the expression and appreciation of Jewish culture through arts, music, drama, theatre, film, literature, and other mediums.

- theatrical and musical programs
- film screenings and programs
- literary readings and discussions
- museum exhibits and programs

7. Strengthening the capacity of Jewish schools to provide quality education

To facilitate Jewish learning and identity development by strengthening the capacity of schools to provide quality educational programs.

- professional education for teachers and other educational personnel
- educational consultation and resource materials for Jewish schools
- central support for Jewish family education
- central support for education of children with disabilities
- central support for Israel experiences

8. Child care

To facilitate the personal and social development and Jewish identification of children, as well as provide respite for parents, in a safe, nurturing and educational setting.

day care

early childhood education programs

9. Employment

To assist individuals in their search for economic self-sufficiency and job and career satisfaction through training, counseling and/or referrals.

career counseling

job placement

job preparation and training

job training and placement services for persons with disabilities

sheltered workshops

10. Counseling and access to community resources

To help individuals and families address emotional and social problems and access financial and informational resources for personal well-being and development.

counseling

case management

information and referral

counseling and advocacy for persons with disabilities

family life education

adoption services

management of social services provided by volunteers

grants and loans to individuals for educational and vocational development

conservatorship

11. Emergency assistance

To assist individuals with emergency, basic human needs- such as food, clothing, and shelter - through the provision of financial assistance and other problem solving services.

emergency cash assistance

transitional housing

12. Institutional care and housing for the elderly

To enable needy elderly individuals to receive comprehensive medical, social, and rehabilitative services or supportive housing in appropriate, safe and nurturing settings.

nursing home care
housing
housing with supportive services

13. Home care and community-based care for the elderly

To enable elderly individuals to remain active and living at home and to prevent isolation and deterioration through home and community based social and health services.

home care
home delivered meals
day care
friendly visiting

14. Health care

To provide outpatient health care for individuals lacking financial resources and adequate insurance coverage.

outpatient medical care

15. Resettlement

To enable refugees, immigrants, and other emigres to resettle successfully through the provision of financial assistance, social services and Jewish acculturation programs.

pre-migration services
reception and orientation services
financial assistance
counseling and case management
English language instruction
employment and career counseling, training and placement
translator services
Jewish education programs
socialization and Jewish acculturation programs
nursery school programs

16. Recreation, physical education, and socialization

To enable individuals and groups to meet each other, enjoy recreational activities, achieve physical wellness, acquire related knowledge and skills, and connect with the community.

health and fitness programs

youth athletic programs

therapeutic and rehabilitative programs in physical education

recreational programs for children with special needs

socialization programs

cultural arts programs

day camping and vacation camping programs

17. Jewish spiritual practices

To enable individuals and families to engage in Jewish spiritual practices in organizations, synagogues, health care institutions, and homes, through education and counseling.

religious information and referral

mikvah

community chaplaincy services

hospice services

spiritual support groups

18. Outreach to the uninvolved

To conduct special efforts to identify and reach uninvolved Jews and to provide them with positive Jewish experiences and connections with the Jewish community.

19. Protecting and advocating for the security and general well-being of Jews

To promote a tolerant and law-abiding society, protect individuals from antisemitism, promote cooperative relations with other groups, and advocate for public funding.

protection from anti-semitism

representation of Jewish religious and cultural interests in the general community

coalitions with other religious and ethnic groups

advocacy on behalf of Israel

advocacy of Jewish community interests concerning government policy and funding

20. Communicating global and local news of interest to the Jewish public

To provide current news, the opinions of citizens, and other information to the Jewish public in order to help develop a more informed, concerned and involved community.

reporting of local, national and international Jewish news

21. Advocacy on behalf of Jews from the former Soviet Union

To advocate for the rights, freedoms, and general well-being of Jews from the former Soviet Union and to assist them in developing Jewish life in their home communities.

advocacy for emigration

monitoring of conditions

provision of special food and medical supplies

promotion of Jewish community development

supporting social and educational programs

22. Israel-Diaspora relations

To enable local individuals to develop more understanding of Israel and to strengthen relations between local Jews and Israelis through educational visits and interactions.

educational experiences in Israel

local study of Israel

missions to Israel

exchange programs

from Jewish Bulletin

3-15-96

JCF seeks individuals' input on priorities

SUZAN BERNS
Contributing Writer

Individual residents are being asked to tell the Jewish Community Federation exactly what they need.

As part of a new program, the S.F.-based federation is exploring gaps and lapses in the services that community-based organizations are currently offering to ordinary citizens.

"We want to find out what people feel...the federation should address through its financial and human resources," said Susan Folkman, chair of JCF's planning and allocations committee.

She added that the committee, which launched the priority-setting project earlier this year, wants to determine which services and issues community members feel "are most important."

"This process is a component of a larger effort at JCF to develop a vision of our role over the next several years," said the federation's president, Doug Heller.

"It's important that donors are kept informed about current and emerging needs," he added, "and [that they] participate in making decisions."

As part of the project, local organizations and synagogues are being surveyed regarding the services they offer. Participants are being asked, among other questions, to list their major service program areas and those areas where needs have gone unmet.

The JCF, meanwhile, wants individuals to contact the JCF with their comments in writing.

Responses from organizations and individuals will be analyzed this spring. The findings will

impact plans and allocations set to take effect as of July 1997, Heller said.

Folkman, a behavioral scientist at UCSF Medical Center, is also a past president of both the Bureau of Jewish Education and Peninsula Temple Beth El.

"There is little doubt that the community will continue to



Susan Folkman

embrace a wide portfolio of causes," she said, noting that determining how to fill the needs, once they have been identified, will be a difficult task.

When demands begin to exceed resources, she added, "it's wrenching to say, 'This set of needs is more important than that set.' But we will have to do it."

The JCF invites readers to contribute their ideas regarding service priorities. Contact Susan Folkman, c/o JCF, 121 Steuart Street, S.F., CA 94105.

from Jewish Bulletin, June 28, 1996

JCF Salutes Excellence

The Jewish Community Federation honored seven individuals and two agencies for outstanding service to the Jewish community earlier this month at the JCF Annual Meeting. In addition, Doug Heller, who has served as JCF president for the past two years, passed the gavel to his successor, Alan Rothenberg.

The Federation also salutes all the volunteers who served so faithfully over the past year... especially Annual Campaign volunteers under the leadership of Harold Zlot... Endowment Fund committees, under Bernard Osher... and the Planning and Allocations committee, under Susan Folkman.

To all volunteers and donors, on behalf of the thousands of people you have helped, congratulations and sincere thanks!

"With appreciation for your wise counsel, your generosity of spirit and your wonderful sense of humor."

So noted the award of appreciation for Douglas M. Heller, who as president has led the Jewish Community Federation through the last two tumultuous years of Jewish life. In his unique good natured style, combining an always-ready quip with no-nonsense directness, Doug steered the Federation community through obstacles including government and United Way funding cutbacks, local agency changes and the highs and lows of the Israeli peace process.

A profound *rodah rabash* to Doug!



JCF's Wayne Feinstein and outgoing president Doug Heller look over a collage of the accomplishments of his one-year term.

Douglas M. Heller
President, Jewish Community Federation
1994 - 1996

Dear Dan,
 Please excuse this a short
 time to day. Thank you.
 Asking me to form the Fellowship
 Board will give me the
 opportunity to encourage our Task
 Force. I am very hopeful that
 you will come from it,
 good things will find their
 way. I would like to see the
 results of the work on both
 sides of the fence. I hope
 that whatever we accomplish
 will bring joy a deep sense of
 fulfillment, & satisfaction.
 Will you visit us at
 35 + Years old? I am
 particularly pleased that we
 will have a special day inter-
 acting with our Task
 Force. I will come from it,
 good things will find their
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